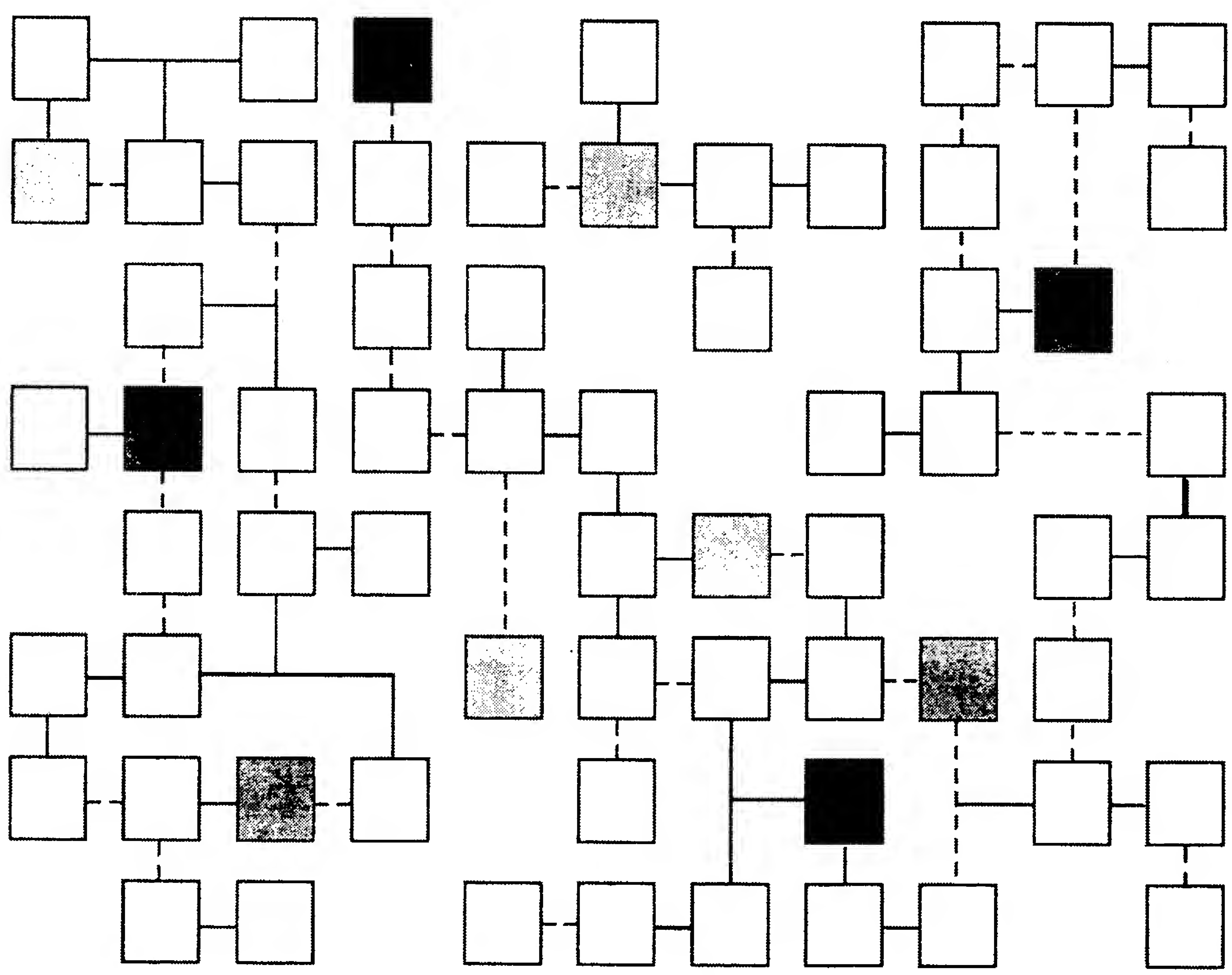
92 PAGES TOTAL

ExtraView™ Administrator's Guide
Version 3.1.2.1



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About This Guide

The ExtraView Administrator's Guide gives users of the ExtraView Web-based issue tracking and workflow management system the knowledge and proficiency needed to accomplish two general goals:

1. Customize ExtraView to conform to their company's workflow processes, business rules, and inter-organizational vocabulary, with all the appropriate data fields and security privileges that are required.

2. Give Administrators the ability to successfully administer ExtraView on an ongoing basis in order to efficiently respond to user inquiries, concerns, and requests.

In writing this guide, we anticipate that the reader is at least somewhat familiar with many of the standard issue tracking functions found in ExtraView. Accordingly, this guide will assume this familiarity, and will focus on describing the Administrative functions of ExtraView.

Separate guides exist for the installation of ExtraView on your platform (not required if you are using Sesame's hosting service), for end users of ExtraView, and for users of the Application Programming Interface.

Guide Organization

The information in the ExtraView Administration guide is organized in the following manner:

Installation & Setup	This section will give Administrators all of the information needed to begin customizing their ExtraView installation.
Standard Configuration	Provides information and instructions on how to alter the standard ExtraView fields to suit your terminology.
Users & Security	Provides information on adding users to the system, adding user groups to the system, and granting permissions to users based on user groups.
Business Rules & Workflow	Describes how to use your existing workflow in conjunction with ExtraView.
Email Functionality	Gives detailed information on all of Extra View's Email notification features.

Notational Conventions

This guide follows certain notational conventions that are explained below:

- Terminology that Administrators can customize in ExtraView will be marked in *italics:*

  Select a *Product* from the list.

- Names of buttons, links, lists, or fields will appear in **bold**:

  Select a value from the **Owner** dropdown list.

- Whenever there are multiple steps involved in achieving a certain result, these will be noted numerically:

  1. Click the **Edit** button.
  2. Select a value from the list.
  3. Click the **Update** button.

Table of Contents

INTRODUCTION

ExtraView Product Description

ExtraView is a Web-based issue tracking system that is designed to meet the following objectives:

- Easy to install, configure and administer, minimizing your organization's setup and ongoing cost of ownership
- Provide functionality that is easily extensible over time
- Able to support your processes and your workflow, without major modification
- Scalable to support large numbers of users and issues
- Easily customized to reflect your company's terminology, and data hierarchies, and able to provide extensive validation for data that describes your organization, products, and services

Key Concept for Understanding ExtraView

ExtraView Installation and Setup

This is a process that is best executed with some advance planning. This purpose of this guide is to give you complete details on the administrative portion of the initial setup and as well as ongoing support for your installation. The basic workflow suggested for setting up your installation is as follows:

- Plan your server hardware and network connectivity to support ExtraView. Sesame's technical support personnel can help with recommendations for suitable platforms
- Install Oracle and the Web server software on this hardware, and establish communications on your company's network or over the Internet
- Install the ExtraView application within Oracle. Please refer to the appropriate ExtraView installation guide for your platform
- Set up ExtraView. This Administrator's Guide covers the design of your system and how to provide the features you need for your company. Briefly, these are:

    - Defining and implementing the various groups or categories of users who will access the system

- Defining and creating the fields in your system
- Defining the relationships between fields
- Designing and laying out screens to support the fields you create
- Creating a structure of permissions that support access to each screen for each user group that was defined
- Setting up the workflow you want to use to control the processes in your company
- Designing standard reports for your users
- Adding user accounts to the system
- Testing the completed system

Defining a Process That Works for Your Company

ExtraView allows the System Administrator to define a process that conforms to the way the company works. It does not impose a fixed methodology on the company. The administrator can, without programming, set up rules appropriate to the company's needs.

Each issue you submit can be moved between any number of states, with each state being visible only to the group of users that are working on an individual state. For example, an *open* problem may only be viewed by the engineering group, who may only mark it *fixed* or *problem not found* after working on it. They could not, for example, *close* the problem since that is a state defined to a different user group.

A user group is created for all people who should follow the same rules. Typically these would fall along the lines of customers, support staff, engineering, quality assurance, etc., but complete flexibility exists to define what user groups you create and how many you create.

Should you have a workflow process that cannot be accommodated within ExtraView's standard functionality, the product can be simply extended with additional source code. ExtraView was designed to make it easy to alter or add functionality within the source code.

Data Dictionary

The data dictionary is the central place where all field definitions are stored and maintained. In addition, this core component of ExtraView controls many of the attributes of each field, such as its display type, display title, whether the field is selectable on reports, the SQL used to populate the field if it's a list, default value, and help text.

Flexibility of the User Interface

ExtraView can be modified in a number of ways in order to tailor its look and feel to any company's needs.

The following changes can be made simply, either by you or by Sesame Technology:

- Alter screen colors and fonts
- Place the system menu horizontally or vertically on the screen
- Add your company logo
- Edit all text labels to reflect your own terminology
- Rename, add, or delete menu items
- Create new menu buttons in any style

User Groups and the Security System

This inter-related group of concepts is central for understanding ExtraView. Individual users belong to one or more user groups and share the same characteristics and permissions. For example, one user group may have read and write access to a particular field, while another group may only be able to view the same field, while still another group may not even be able to see the same field.

Any field that is available in ExtraView has a security key to protect it. They can either be whole menus, or individual fields within a screen. For example, a security key exists for accessing the security module itself. Another security key exists for the product menu item on the Administration menu. Another example is that a security key exists to control access to the description field. Basically, all of the fields that are visible on ExtraView can be turned on or off based on user group privileges.

The Grant Security Privileges section controls all these accessibility features in your version of ExtraView. In a matrix view, the intersection of the security key and the user group is a read and write switch. Therefore, for every item that has a defined security key, you can allow or prohibit any user group to access that feature.

Screen & Report Layout Editor

This component of the administration allows you to set up and alter the layout of the *Add Problem* and *Edit Problem* screens. In addition, key reports such as the Quick List and the Detailed Report also use layouts defined by this function. Different layouts can be defined for different user groups within your system, offering a tremendous amount of flexibility. Each layout works in conjunction with security permissions for each field. Therefore, an important concept to understand is that simply placing a field on a screen does not automatically give all users the ability to read or write to the field. Using the

Grant Security Privileges option allows you to define which fields are visible and updateable to each group of users. The security privilege for the field overrides the fact that a field may be placed on a screen or report.

Interest Lists

These are a powerful feature of ExtraView, ensuring automatic notification of events to appropriate individuals within an organization. Interest lists can be defined within the data dictionary on any field that may have a list of values. For example, you may define an interest list that notifies individuals on all issues that have a severity level of *critical*, or you may define an interest list that notifies individuals whenever an issue affects a particular *module*.

Reporting

Within the ExtraView administration, Reports can be defined to be available to the entire community of users. Reports can be simply a set of filters that are used to query the ExtraView database, or they can be coupled with internal or customized layouts.

Application Programming Interface (API)

The API to ExtraView allows the user to extend ExtraView's functionality. The key features of the API are:

- A full Command Line Interface (CLI) that allows users to access functions such as adding, updating, deleting and searching from a command line. This is typically used from a UNIX, Linux or Windows NT command shell.
- A set of URL functions which access ExtraView to perform functions. This eliminates the need for expensive software such as SQLNet on each client computer.
- An extendible interface allowing the user to create additional functions with source code. This can be used, for example, to integrate other applications, such as CRM and SCM directly into ExtraView.

INSTALLATION & SETUP

The ExtraView Installation and Setup features are designed to provide the System Administrator with a toolset for making even the most highly custom design and configuration requirements easy to implement, with little or no programming required.

These same features also make it possible for the Administrator to continue to customize and refine the system to better conform to the company's changing needs, with little or no downtime.

Note: Because initial installation and setup requirements will normally have been implemented by the Sesame Technical Support team at the time of license, it may be advisable for the System Administrator interested in first learning day-to-day system management functions to skip this chapter for now , and begin instead with chapter 2, Users and Security.

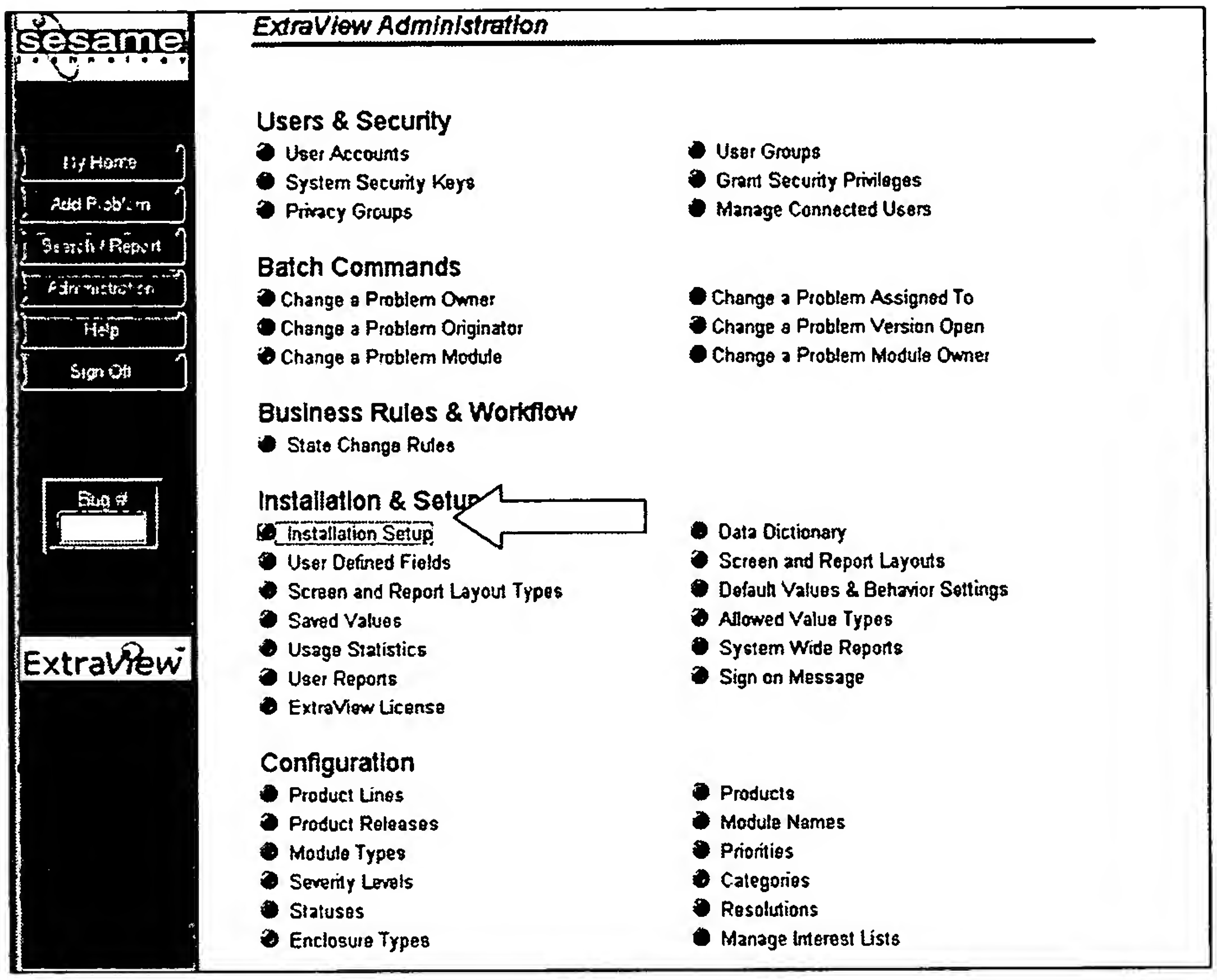
System Customization

The following topics will guide you through your ExtraView customization process: Data Dictionary, User-Defined Fields, Layout Editor, Allowed Value Types, Sign On Message, Behavior Settings, Usage Statistics, Configuration Settings, User Roles, Home Screen, and Editing Personal Options.

Installation Setup

This section allows you to set up and modify system level information that is used throughout the ExtraView system. This is one of the key places where installation information is altered. A Sesame Technology representative will enter most of this information for greater customer convenience.

1. Installation Setup is found under the Installation & Setup sub-heading on the Administration menu.



ExtraView Administration menu

The following screen appears:

Installation Setup - Installation

	Database field name	*Value*	*Description*
Edit	COMPANY_NAME	Redback	.
Edit	COMPANY_ADDRESS1		.
Edit	COMPANY_ADDRESS2		.
Edit	COMPANY_CITY		.
Edit	COMPANY_STATE	CA	.
Edit	COMPANY_ZIP		.
Edit	COMPANY_PHONE	(831) 461-7100	
Edit	COMPANY_EMAIL		.
Edit	WINDOW_BG_COLOR	white	Window background color
Edit	BG_COLOR	#EEEEEE	Background color for tables
Edit	BG_ALT_COLOR	#D9E0E4	Alternative background color for tables
Edit	ALT_COLOR	white	Alternate color for add, edit and search screens
Edit	LABEL_COLOR	royalblue	Color of field labels on the screen
Edit	TITLE_COLOR	scarlet	.
Edit	DEFAULT_FONT	Arial, Helvetica, sans-serif	.
Edit	MENU_DIRECTION	VERTICAL	The main menu can be HORIZONTAL or VERTICAL
Edit	SESSION_EXPIRE_TIME_HOURS	24	Max session idle time before user is forced to re-login

Installation Setup screen

2. Clicking the **Edit** icon next to an item allows you to make changes to the default settings. For example, this is the screen for editing WINDOW_BG_COLOR, which is the Window Background Color.

Change entry in the installation details table

Fixed database name	WINDOW_BG_COLOR
Description	Window background color
Value	white

Update Cancel

Editing Installation Details

3. To edit this value or any of the others in this section just change the Description and or Value and click the **Update** button.

4. Below is a complete list of Installation Setup Database Field Names, sample values and their appropriate descriptions; they can be altered in the Installation & Setup option.

Application Default Name	***Typical Value***	***Description***
COMPANY_NAME	Your Company Name	Company Name
COMPANY_ADDRESS1	269 Mt Hermon Rd	Address 1

COMPANY_ADDRESS2		Address 2
COMPANY_CITY	Scotts Valley	Company City
COMPANY_STATE	CA	State
COMPANY_ZIP	95066	Zip Code
COMPANY_PHONE	(831) 461-7100	Phone Number
COMPANY_EMAIL	support@sesame.com	Email Address
WINDOW_BG_COLOR	White	Window background color
BG_COLOR	Gainsboro	Background color for tables
BG_ALT_COLOR	Lightsteelblue	Alternative background color for tables
ALT_COLOR	White	Alternate color for add, edit and search screens
LABEL_COLOR	#0000FF	Color of field labels on the screen
TITLE_COLOR	Scarlet	Color for titles on the screen
DEFAULT_FONT	Arial, Helvetica, Sans-serif	Default font for text in the system
MENU_DIRECTION	VERTICAL	The main menu can be HORIZONTAL or VERTICAL
SESSION_EXPIRE_TIME_HOURS	24	Max session idle time before user is forced to re-login.
SITE_URL	http://www.extraview.net	The URL for your ExtraView site.

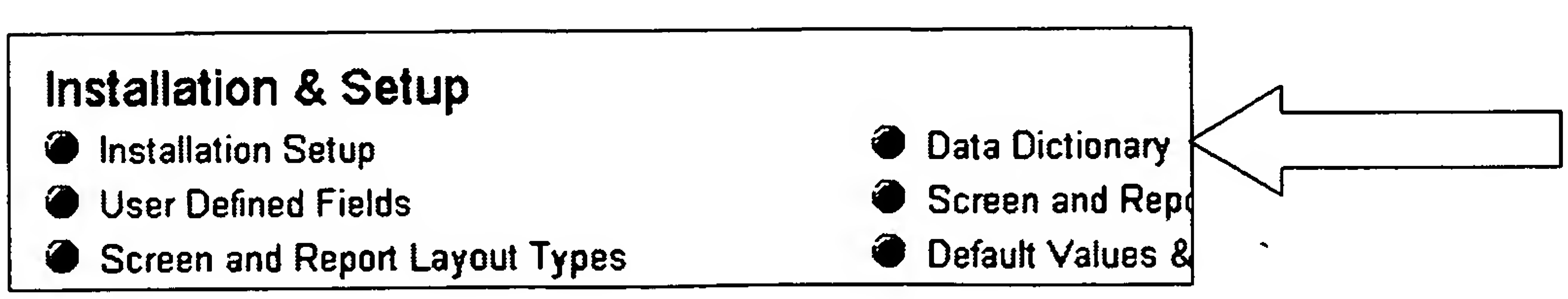
Data Dictionary

The data dictionary is the central place where all field definitions are stored and maintained. In addition, this core component of ExtraView controls many of the attributes of each field, such as:

- display type.
- display title.
- whether the field is selectable on reports.
- the SQL used to populate the field if it's a list.
- default values.
- help text and more.

Edit Data Dictionary Items

1. From the Administration menu, click on **Data Dictionary**.



The following screen appears:

Data Dictionary

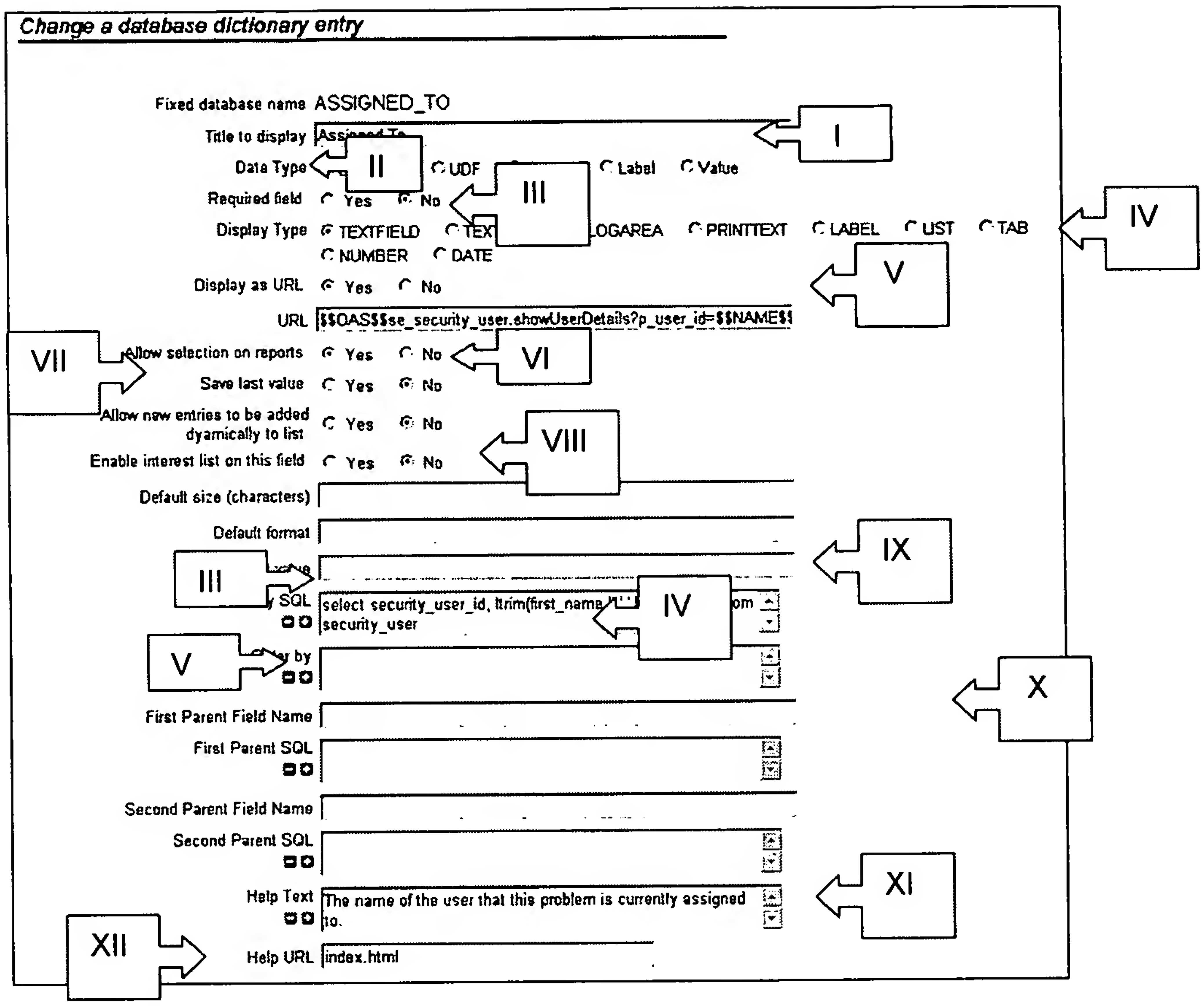
Add Add a new field to the database

	Fixed name	*Screen title*	*Type*	*Help Tip*	*Created*	*Last updated*
Edit	ACTIVE	Active	Database	Whether the item is active	system 26-MAY-2000 11:26	system 21-DEC-2000 22:34
Edit	ALT_ID	Alt ID	Database	This is the alternative ID for a problem	system 26-JUN-2000 14:13	system 07-MAR-2001 14:55
Edit	AREA	Area	Database		system 26-MAY-2000 11:26	system 28-JUN-2000 15:16
Edit	ASSIGNED_TO	Assigned To	Database	The name of the user that this problem is currently assigned to.	system 26-MAY-2000 11:26	flo 20-JUN-2001 11:20
Edit	ASSIGNED_TO_NAME	Owner	Database		system 30-NOV-2000 16:50	flo 12-JUN-2001 08:46
Edit	ATTACHMENT	Attachments	Database	The file or files that you are able to attach to a problem.	system 09-JUL-2000 18:57	system 10-DEC-2000 11:55

Data Dictionary Summary Screen

4. Click the **Edit** button next to the item that you want to modify and then press **Update** to save the changes.

5. You can include or alter many different features from this screen; see the screenshots below, with their corresponding roman numerals.



Edit Data Dictionary Item Screen

I. The Screen Title for any field in your ExtraView system. Just type a title in the given field and update. The field name will instantly be changed throughout ExtraView.

II. The Data Type. Once set, these should not be altered. Changing these may have disastrous consequences on the use of ExtraView.

   a. DATABASE. These are ExtraView's inbuilt database fields. Their type must never be changed.

   b. UDF. These are the User Defined Fields in your system.

   c. SCREEN. These are the names of the screens within the ExtraView system.

   d. LABEL. These are fields created purely as informational labels on screens, and for which no value is stored.

III. Required Field. You have the ability to set a field as required or not.

IV. The Display Type. This can be changed into any one of the following:

a. TEXTFIELD. This is a normal, one line text field. Data may be up to 255 characters in a TEXTFIELD.

b. TEXTAREA. This is a larger, multi-line text field; it is expandable and collapsible and can hold up to 32k of text.

c. LOGAREA. Similar to a TEXTAREA but previous entries to the field cannot be edited. You will see the User ID of the person who updated the field and the time and date when it was updated. It thus functions as a log of successive entries to the field.

d. PRINTTEXT. This is also similar to the TEXTAREA field, but on display, a fixed-width font is used for the field. This can be used if the field may routinely be used to hold diagrams drawn with characters such as +------+ on the keyboard and you want to preserve the accuracy of the diagram.

e. LABEL. A simple form label.

f. LIST. A list of values; you can add or delete list items from the Configuration screen or from the User Defined Fields section.

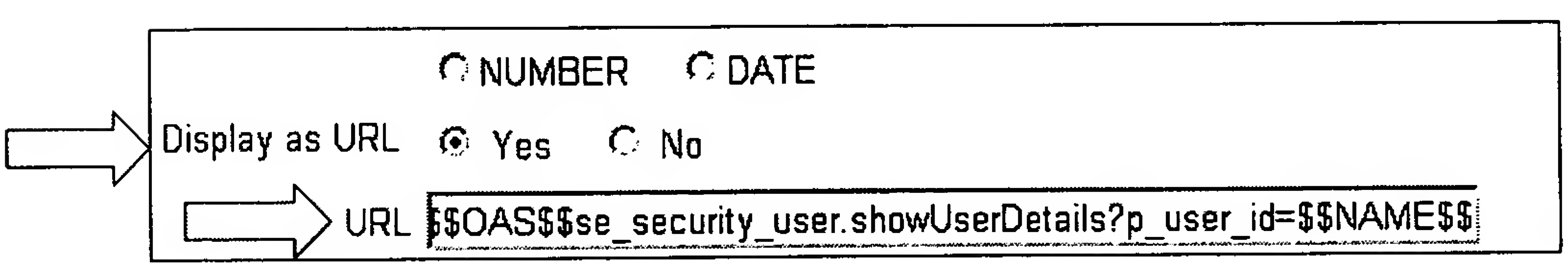
g. TAB. A list of values that is displayed as a set of tabs across the screen. Typically this is used to provide a high-level selection on a screen, where the subsequent fields depend on the tab selected. You should not use this display type if the supporting list has more than six entries.

h. NUMBER. A field that accepts and stores only numbers.

i. DATE. This is a field that allows dates to be entered and stored.

V. The ability for a field to be associated with a URL.

a. From the Data Dictionary click the Display as URL radio button to YES



b. Type the appropriate URL in the URL field below the Display as URL button

c. The URL can be anything you like, as long as it ends with **?p=$$VALUE$$**. This will take the value that is in the field and attach it to the appropriate URL.

Examples:

i. http://search.yahoo.com/search?p=$$VALUE$$ - After pressing the URL button Yahoo search results will be returned for the value that is in the particular field.

ii. **$$OAS$$se_security_user.showUserDetails?p_user_id=$$VALUE$$** - This example will display a particular user's details. By pressing the URL button a screen will be returned showing information on the user, from the ExtraView Database.

VI. Allow Selection on Reports. This will enable the particular field to be available on Additional Reports.

VII. Save Last Value. This will allow the user to save the previous value in the list when adding, editing or deleting.

VIII. Enable Interest List. By choosing YES you are able to go into the configuration for this particular field and create an Interest List based on a particular value.

IX. Default Value. From here you have the ability to enter a default value for a particular field. This value will have to be the actual database name as opposed to the title and will be automatically selected each time you add a problem to the database.

X. SQL Statements. This shows the SQL statement used to populate the particular list. These fields also give you the option of inputting Parent Field Names and Parent SQL as well as Child Field Names and Child SQL in order to create dependencies.

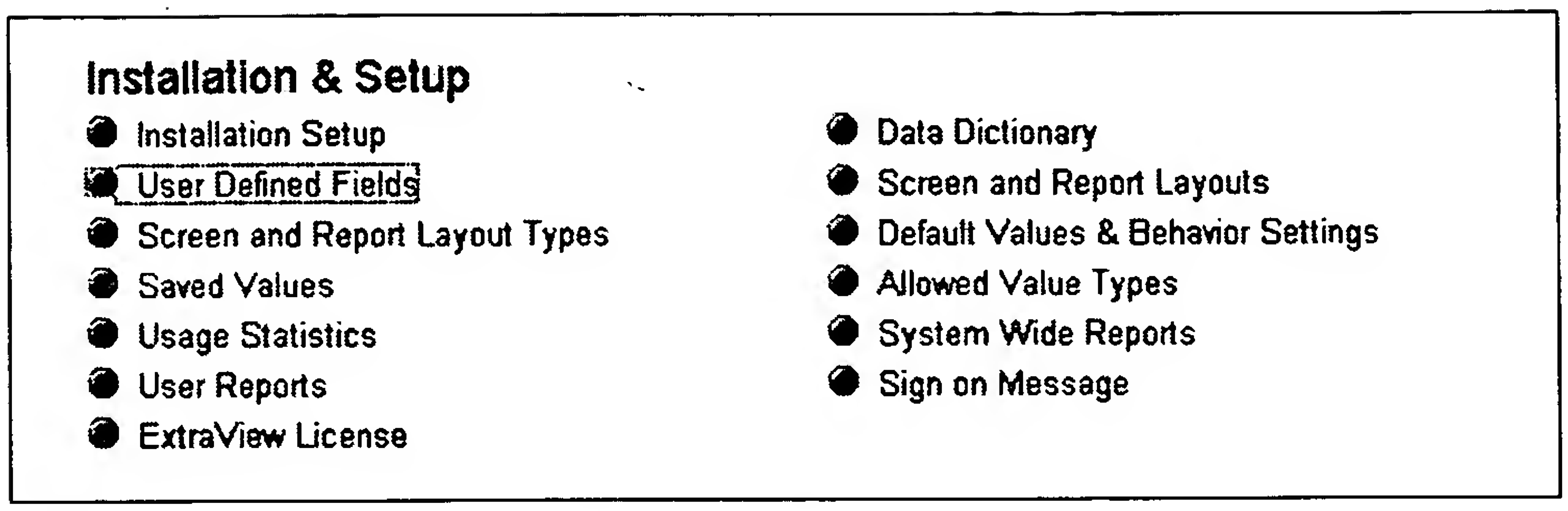
XI. Help Text (tool tip). When you mouse over a field, this is the message that will appear.

XII. Help URL. You can link this to a field or page in your online help system. If you are an ExtraView hosted customer, note that this URL need not be on Sesame's server. You can store and access these files stored anywhere and accessible over the Internet.

User Defined Fields (UDFs)

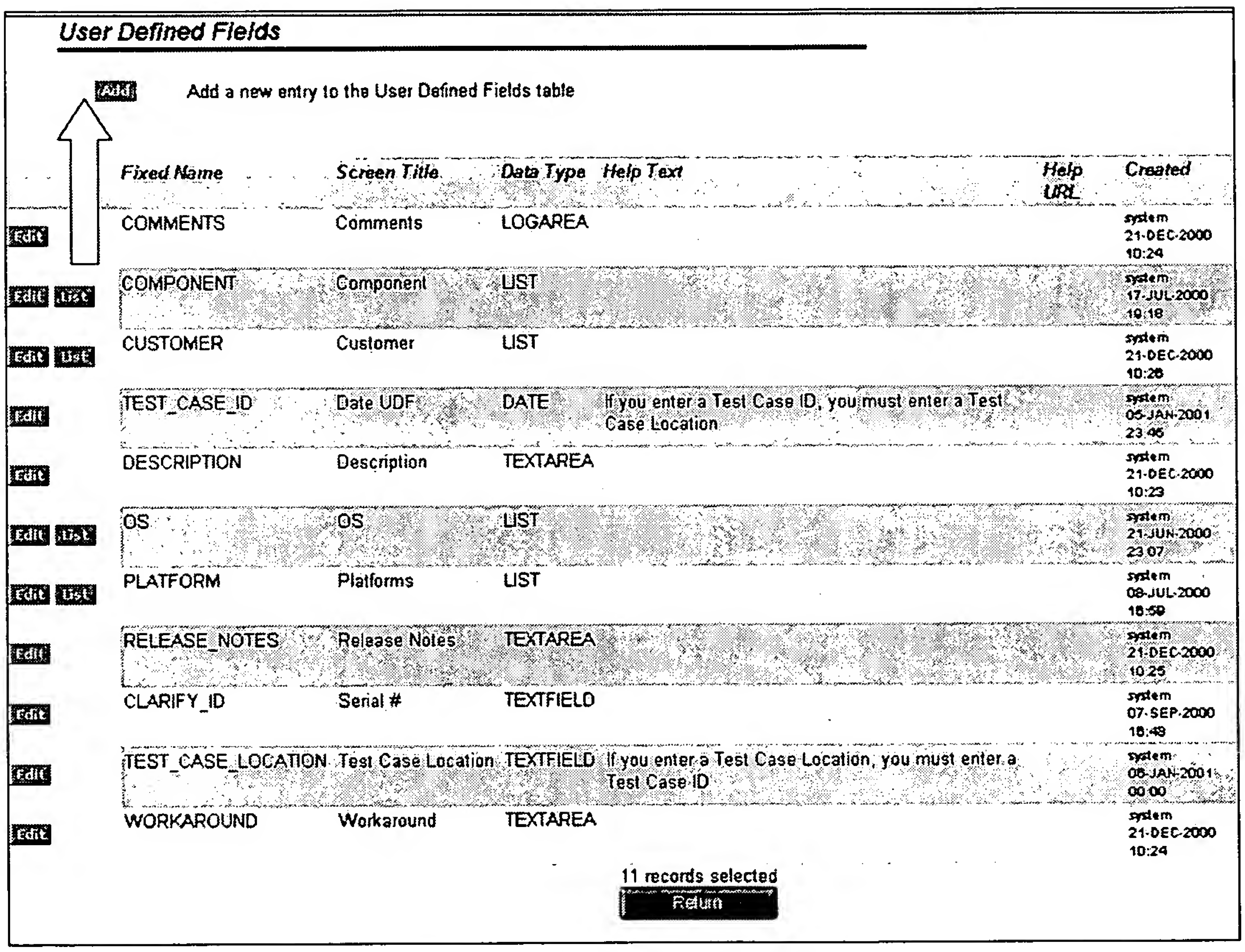
A User Defined Field is a field that is setup specifically for your ExtraView installation and does not exist in the basic product. Since users may want to further customize their own site to include fields that are more specific and appropriate to their needs, **UDFs** are available to satisfy this requirement. This is a highly efficient and extensible mechanism. There is no limit to the number of UDFs that may be created.

1. User Defined Fields are found under the Installation & Setup sub-heading on the Administration menu.



Installation & Setup section

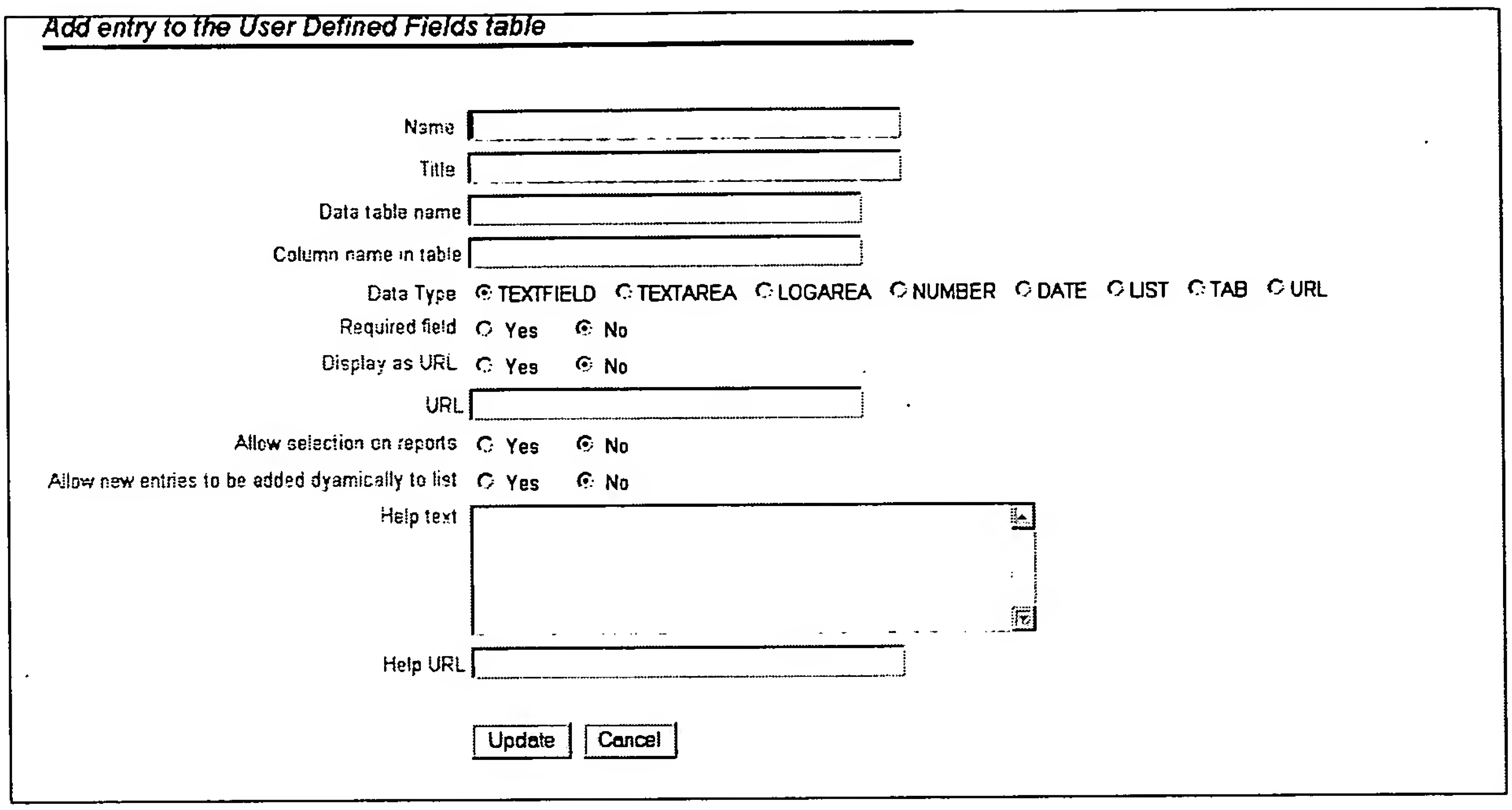
2. Click on **User Defined Fields**. The following screen appears:



	Fixed Name	Screen Title	Data Type	Help Text	Help URL	Created
Edit	COMMENTS	Comments	LOGAREA			system 21-DEC-2000 10:24
Edit List	COMPONENT	Component	LIST			system 17-JUL-2000 19:18
Edit List	CUSTOMER	Customer	LIST			system 21-DEC-2000 10:26
Edit	TEST_CASE_ID	Date UDF	DATE	If you enter a Test Case ID, you must enter a Test Case Location		system 05-JAN-2001 23:46
Edit	DESCRIPTION	Description	TEXTAREA			system 21-DEC-2000 10:23
Edit List	OS	OS	LIST			system 21-JUN-2000 23:07
Edit List	PLATFORM	Platforms	LIST			system 08-JUL-2000 16:59
Edit	RELEASE_NOTES	Release Notes	TEXTAREA			system 21-DEC-2000 10:25
Edit	CLARIFY_ID	Serial #	TEXTFIELD			system 07-SEP-2000 16:49
Edit	TEST_CASE_LOCATION	Test Case Location	TEXTFIELD	If you enter a Test Case Location, you must enter a Test Case ID		system 08-JAN-2001 00:00
Edit	WORKAROUND	Workaround	TEXTAREA			system 21-DEC-2000 10:24

Add User-Defined Fields screen

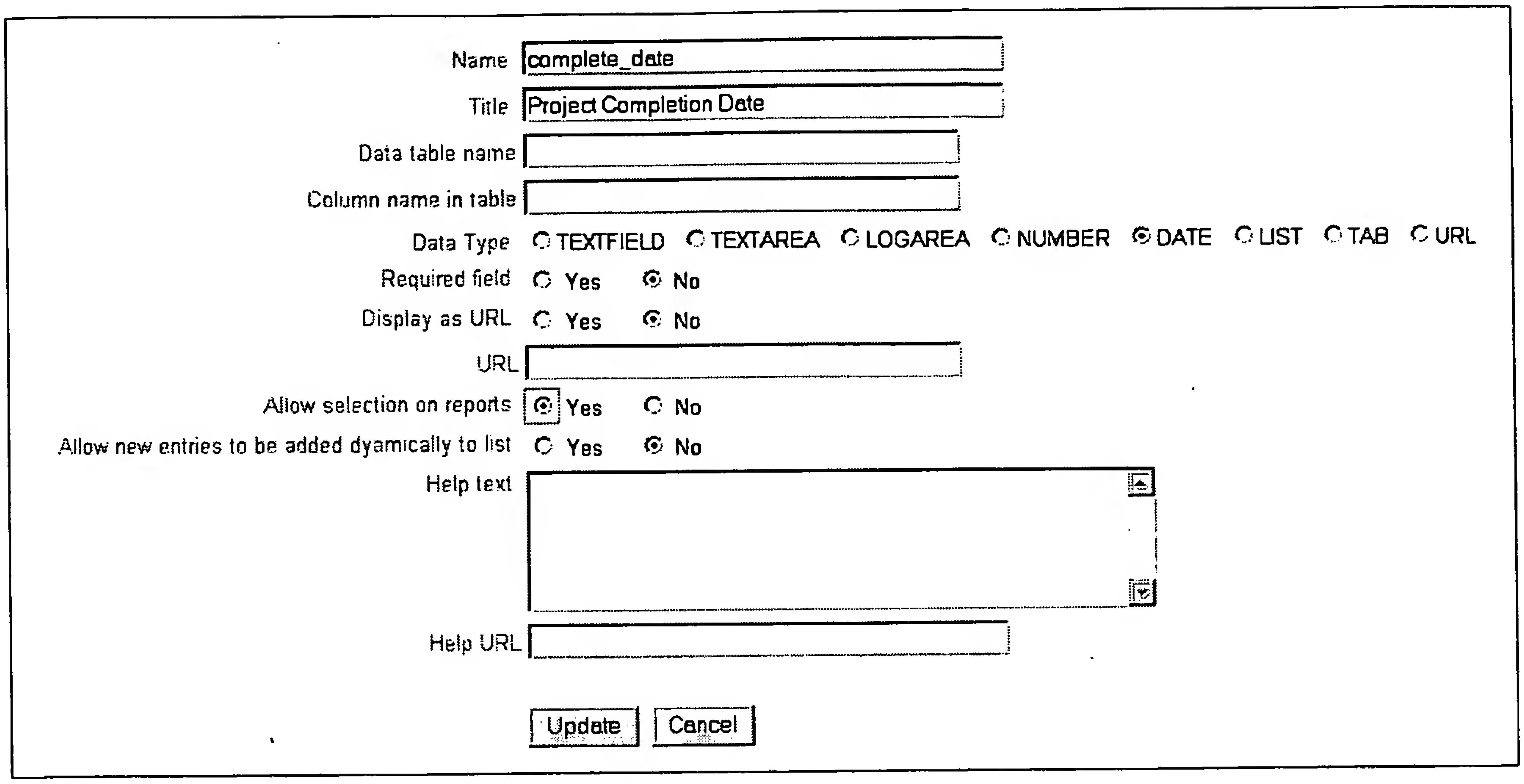
To add a new **UDF**, click on the **Add** icon:



Add a New UDF

3. Enter a Name (which will become the database name), Title (which will appear on the screens), and select a Data Type. The remaining items are optional, however you may want set Allow Selection on Reports to "Yes" to ensure the new UDF will appear in the various ExtraView reports. Any item that appears in bold on the screen is not optional, and is needed to continue any further within the site. Click **Update** when finished.

It is very important to note that UDF's can be created in the manner described above, but are not yet available to users on their screens. To achieve this, two further steps must be taken. After creating the UDF you must place the field on a layout at the appropriate place and you must then make the fields visible to the appropriate user groups, via the Grant Security Privileges screen.

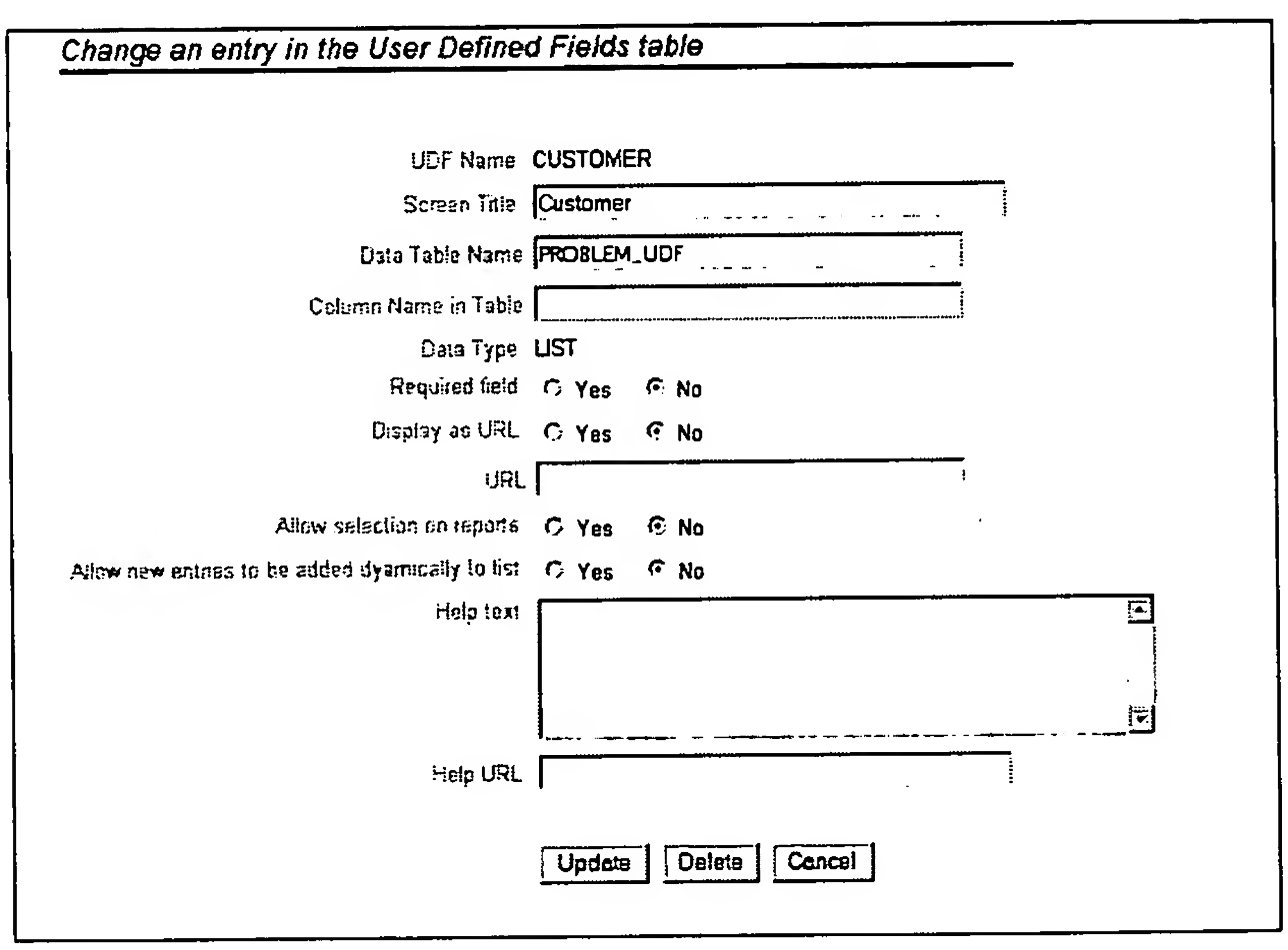


Creating a New UDF

Editing an Existing User-Defined Field

To edit an existing UDF:

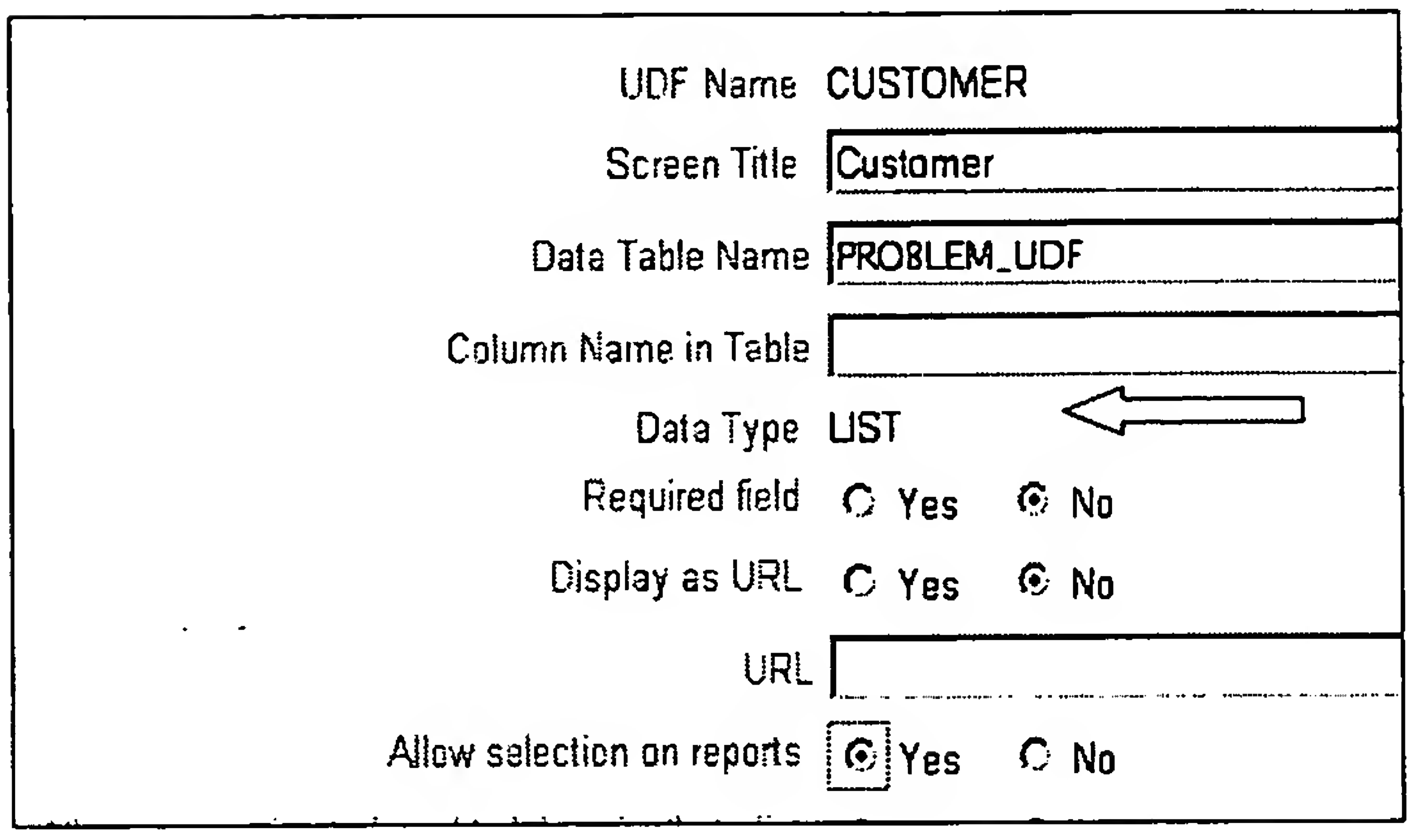
1. Click the **Edit** icon next to the UDF you wish to change, which brings up the following screen:



Edit an existing UDF

2. Make the desired changes, and then click the **Update** button.

Note: You cannot change the UDF data type from this screen. This can only be done in the Data Dictionary. See Screen shot below.



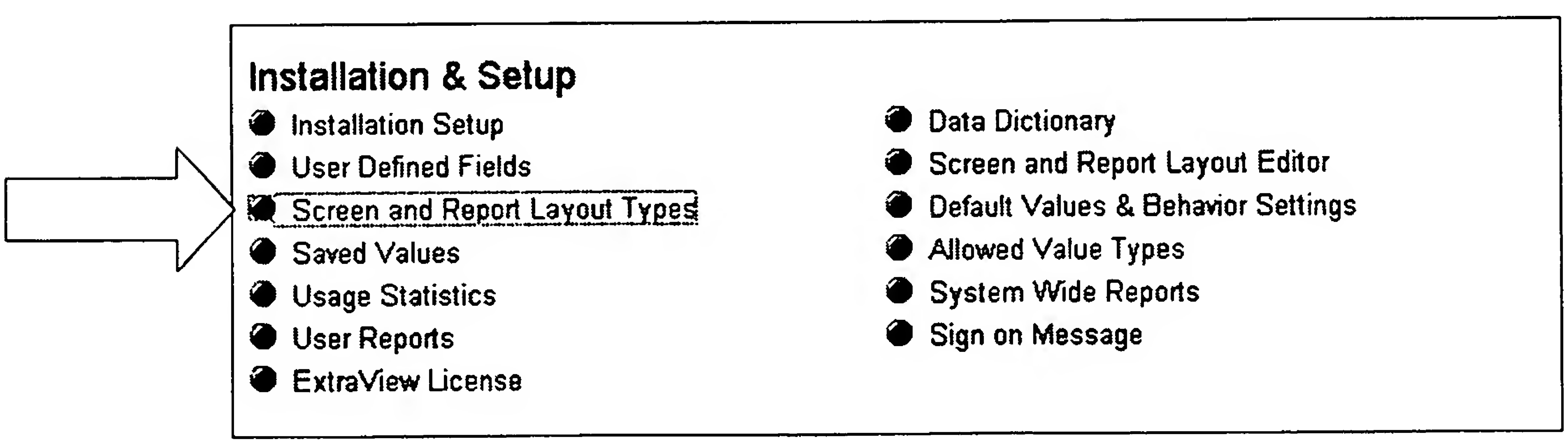
Edit UDF Screen

ExtraView Layout Editor

The **Layout Editor** allows you to create your own customized screens in ExtraView. You are able to add fields for specific user groups or you can add fields on a default basis and control user access through Grant Security Privileges.

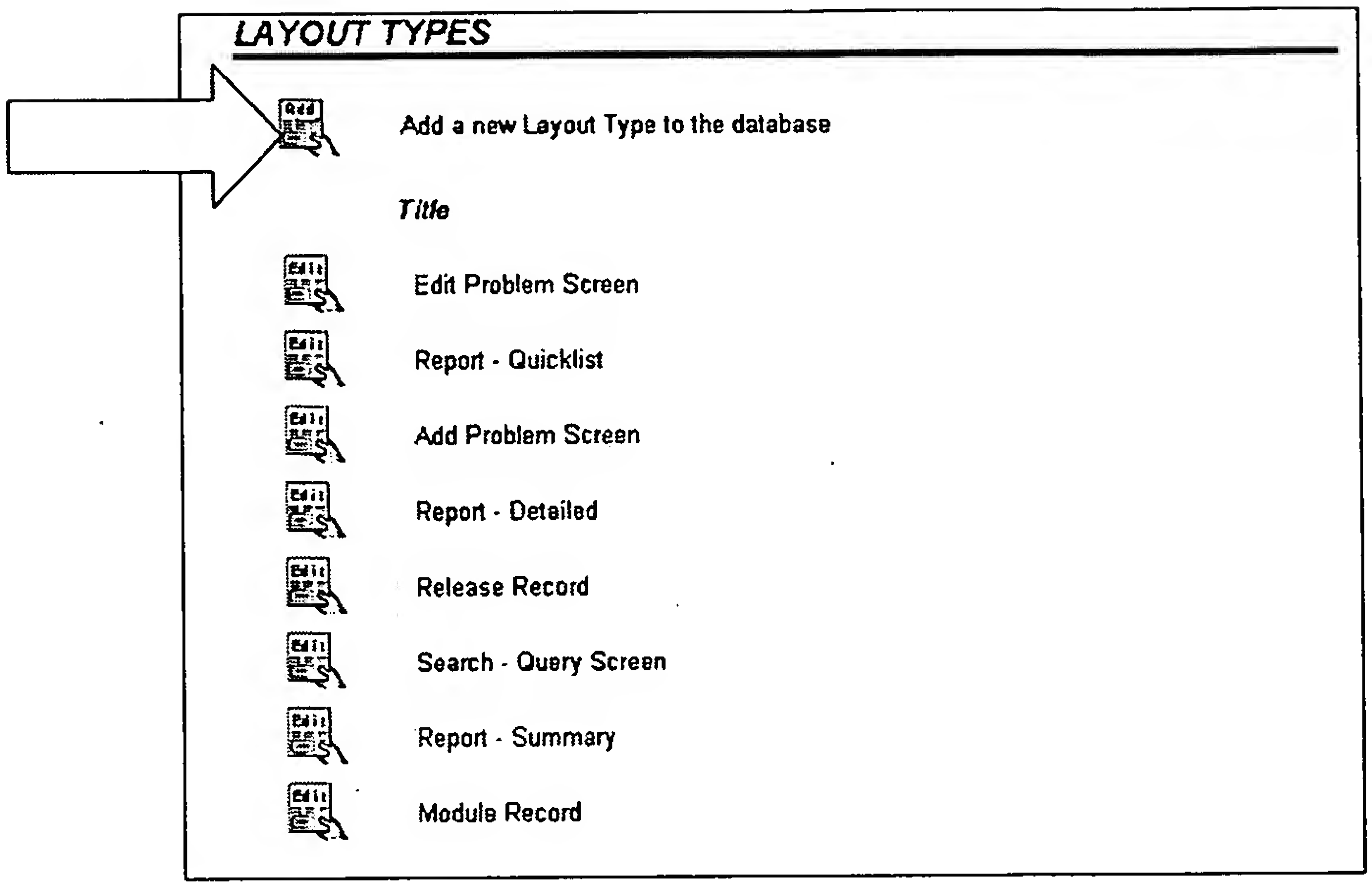
Adding Layouts

1. The first step is to define the screen layout types you will be using. These are limited to the Add, Edit, Release and Search screens, however all ExtraView reports will soon be integrated into the Layout Editor. From the ExtraView Administration screen, select Screen and Report Layout Types, in the Installation & Setup section.



ExtraView Administration Screen

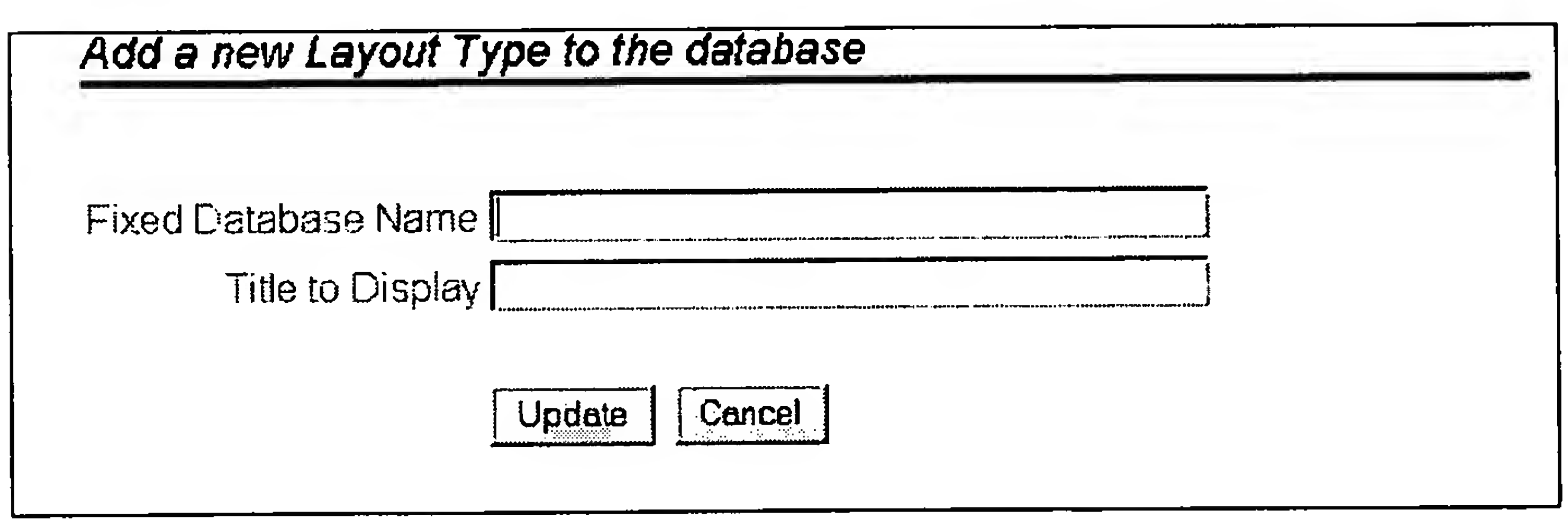
2. Click on the **Add** icon to add a new layout type.



Screen and Report Layout Types

3. Enter the fixed database name and an appropriate screen title to display. The fixed database names are: ADD_PROBLEM, EDIT_PROBLEM, RELEASE, SEARCH, QUICKLIST, DETAILED_REPORT, SUMMARY_REPORT, and MODULE.

4. Click the **Update** button when finished.



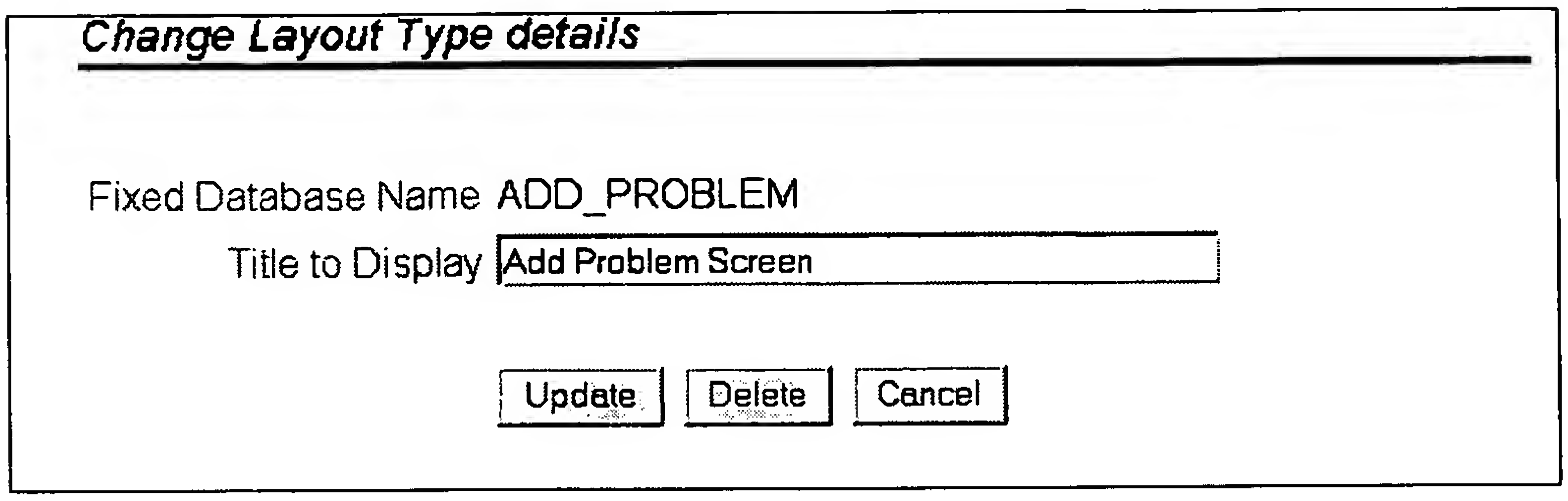
Adding a new Layout

Editing an existing layout type is accomplished in a similar manner.

1. Click the **Edit** icon next to the layout type you wish to change.

2. You can now delete the layout by pressing the **Delete** button, or change the screen title to display. You cannot change the fixed database name.

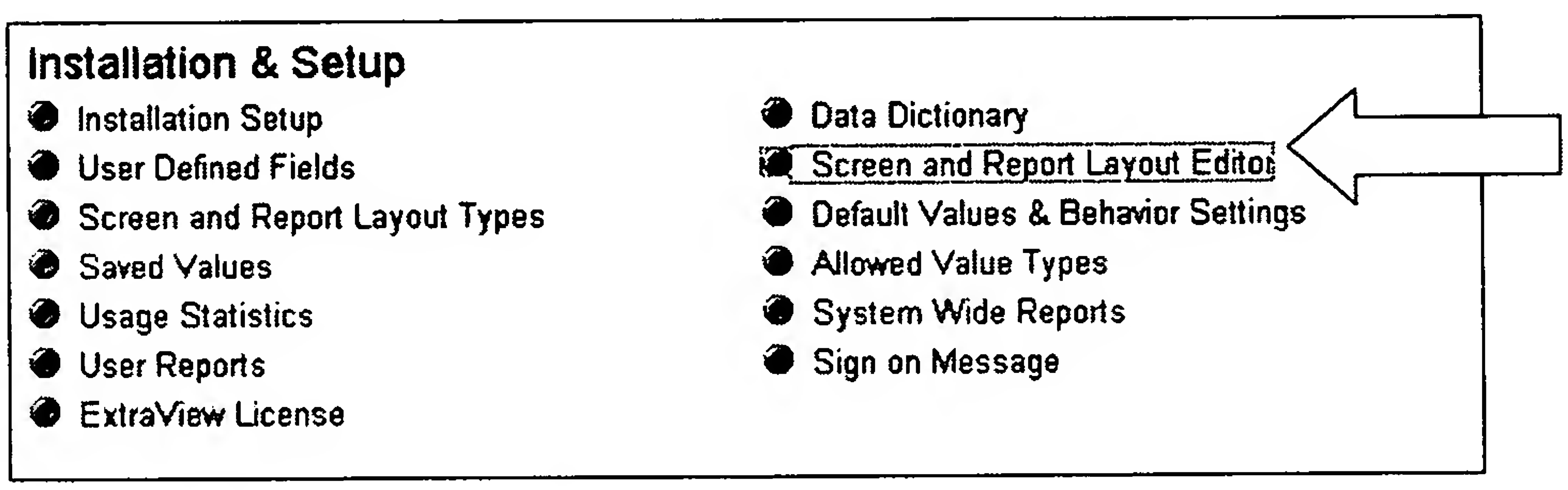
3. When you are finished, press the **Update** button.



Editing an existing Layout

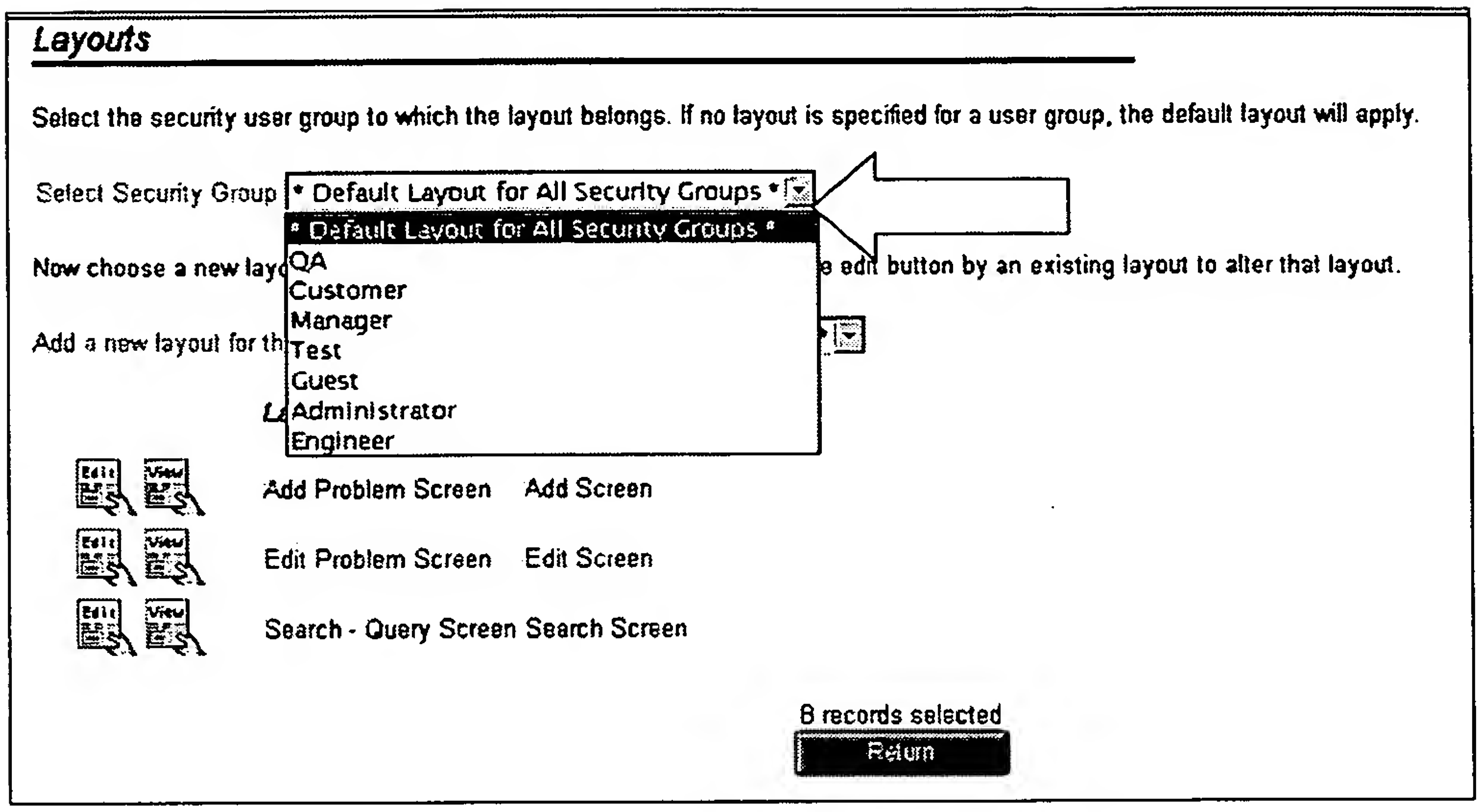
Editing Screen Layouts

Once you have created the layout, return to the ExtraView Administration screen, and select **Screen and Report Layout Editor** from the Installation & Setup section.



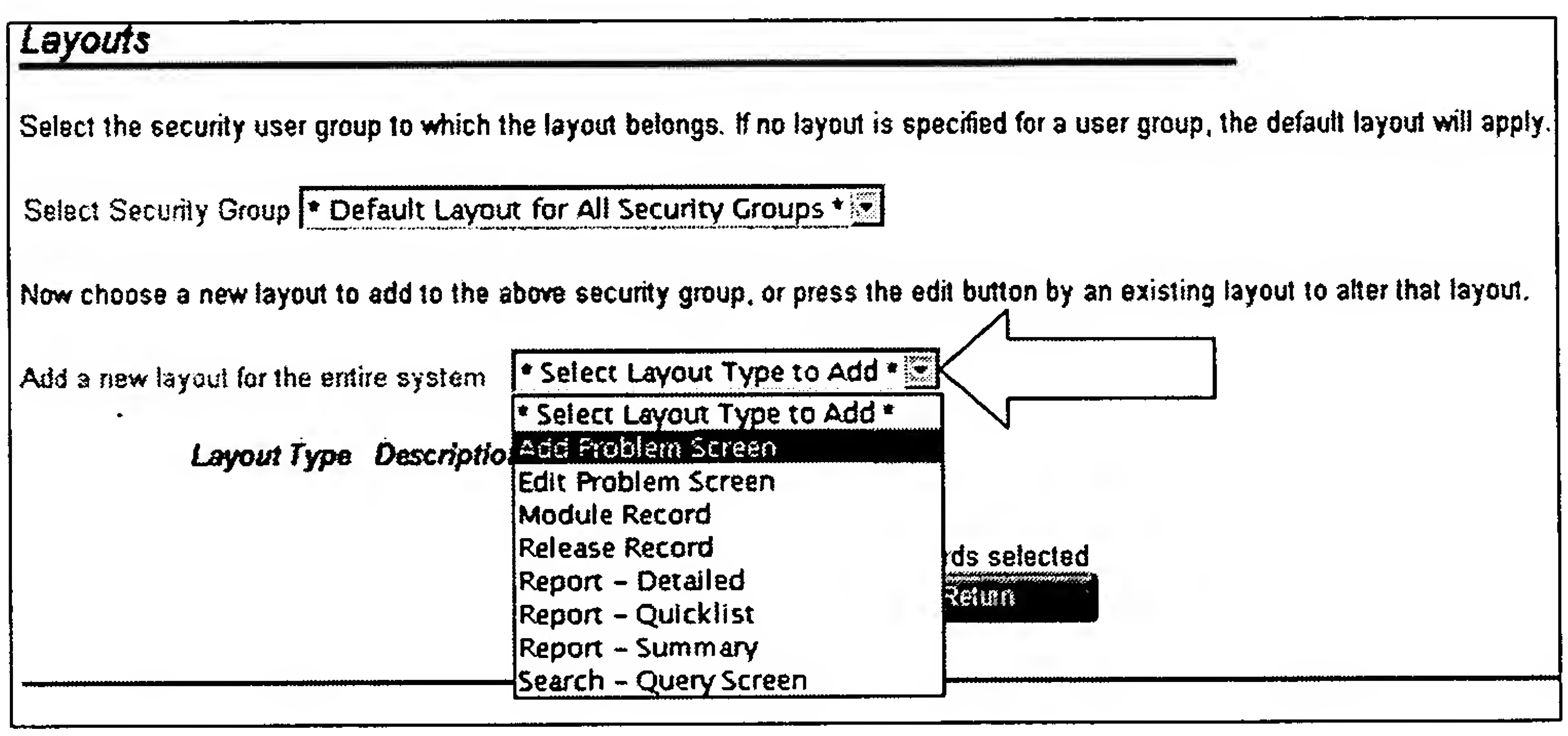
ExtraView Administration screen

1. If you would like to create ExtraView screens for specific user groups, then you can select the Security Group to which the layout will apply from the dropdown list at the top. Additionally, you can use the default layout and control User Group screen and field access via the Grant Security Privileges section of the ExtraView Administration screen.



Selecting a Security Group

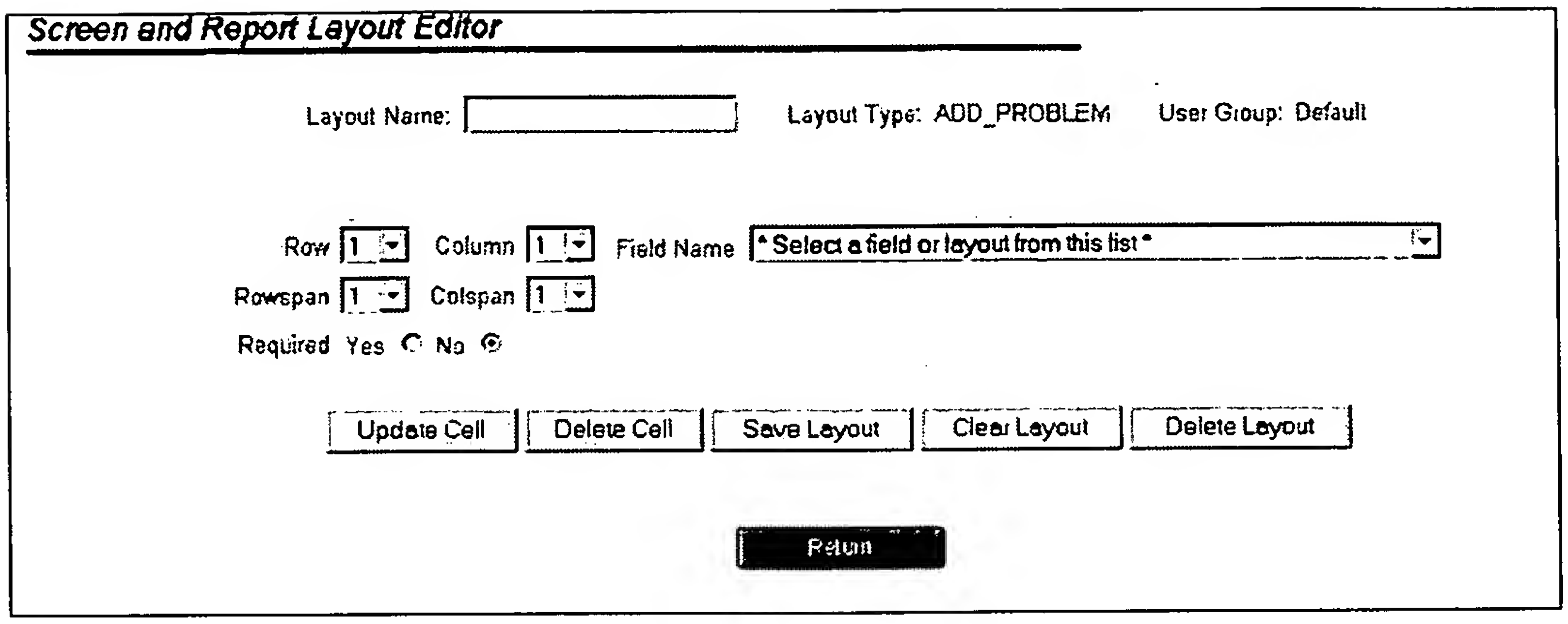
2. Select the layout type to customize. The names in this field are the screen titles you chose when creating the layouts.



Selecting a layout

For this example, we have selected *Add Problem*, which gives the following screen:

Note: You will have to repeat steps 4 thru 8 for the Edit Screen and the Search Screen.



Add Problem Screen Layout

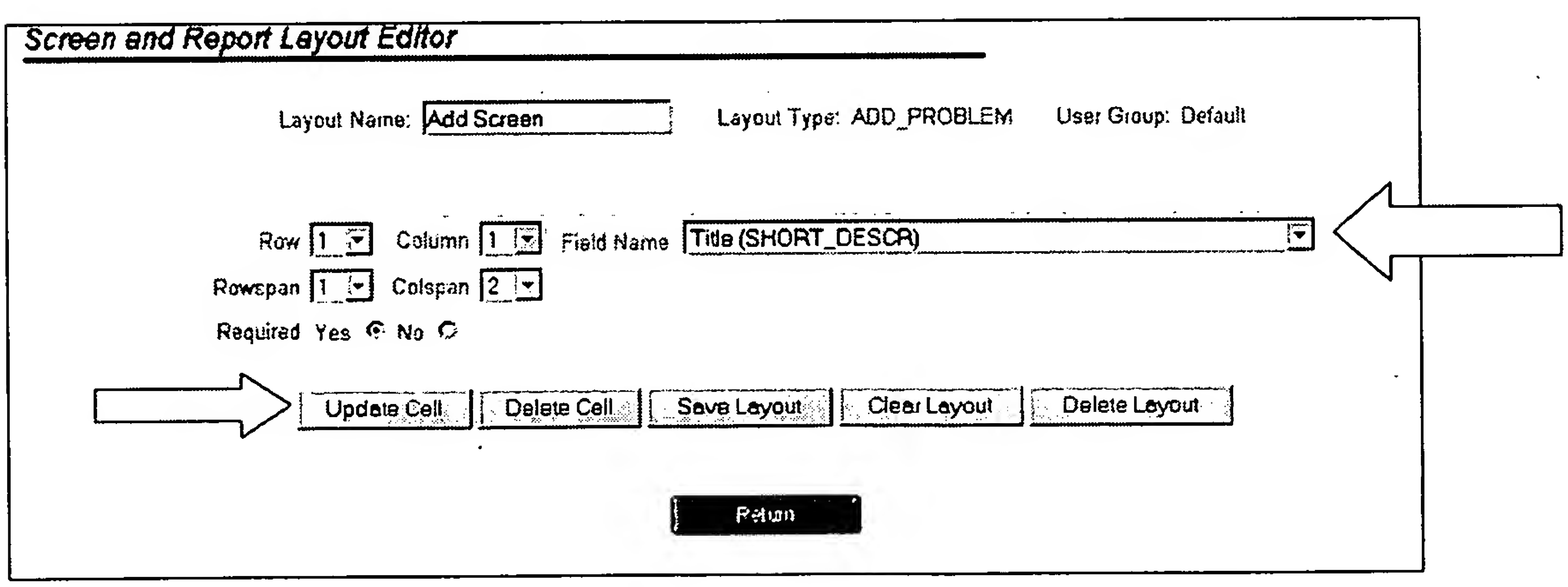
The screen layout is based on a grid, so you will have to choose the appropriate columns and rows to designate where you want a particular field to be placed. In this example, we want to place the *Title* field (SHORT_DESCR is the database name) in the top left hand corner of the Add Problem screen.

4. To do this, select the field name from the Field Name list (which displays all the fields available, sorted alphabetically by screen title). Ensure *Row* is set to 1, and Column is set to 1, this indicates that the field will appear in the first row and first column of the Add Problem form.

The Rowspan option will allow a field to span several rows.

The Colspan option will allow a field to span several columns.

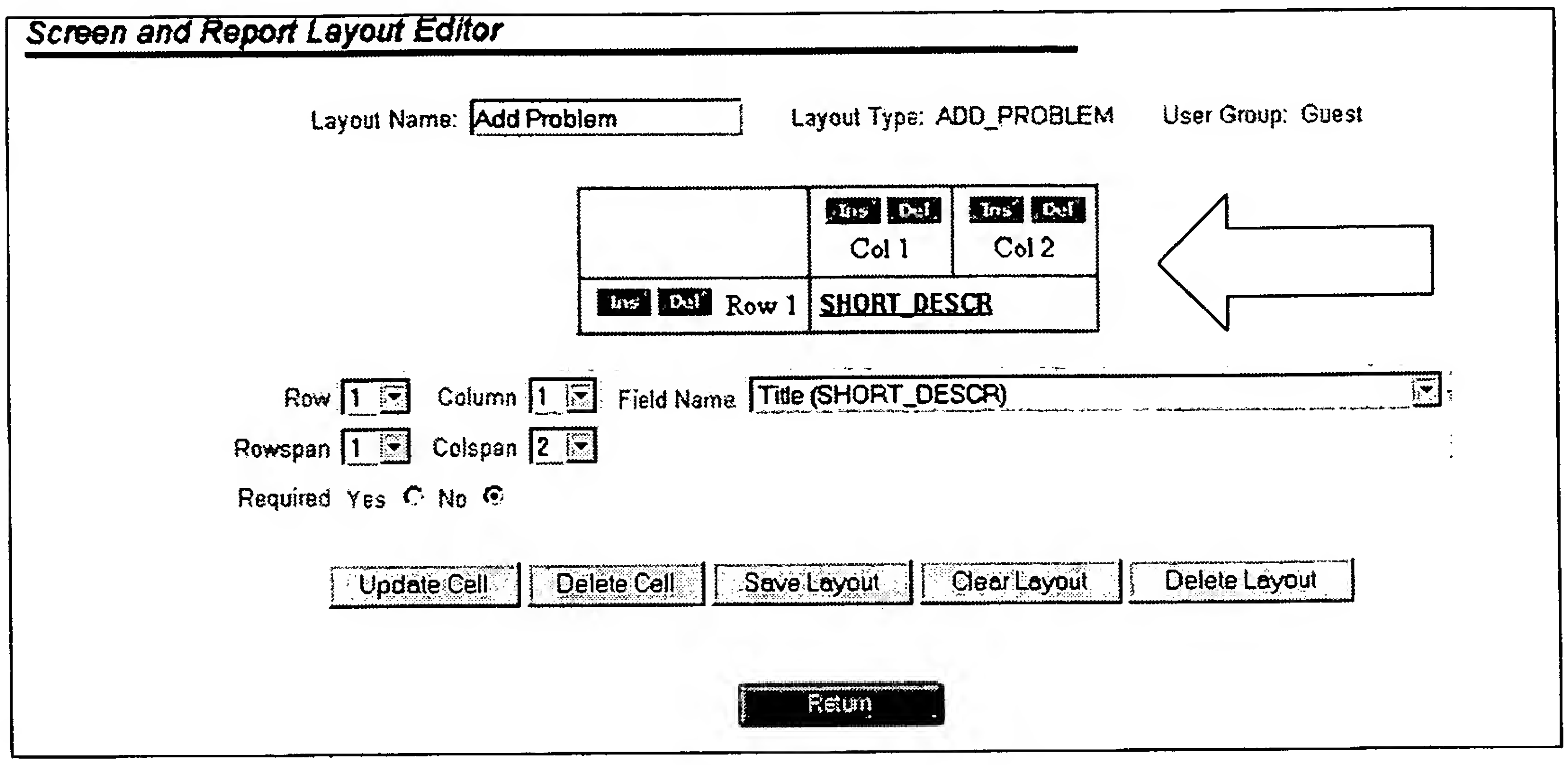
In this case we want the *Title* field to be a long field, so we have set the Colspan to 2.



Building the Add Screen

5. Click the **Update Cell** button when finished.

6. After updating the cell, you will see a screen that shows the layout of the Add Screen so far.



Add Screen Layout

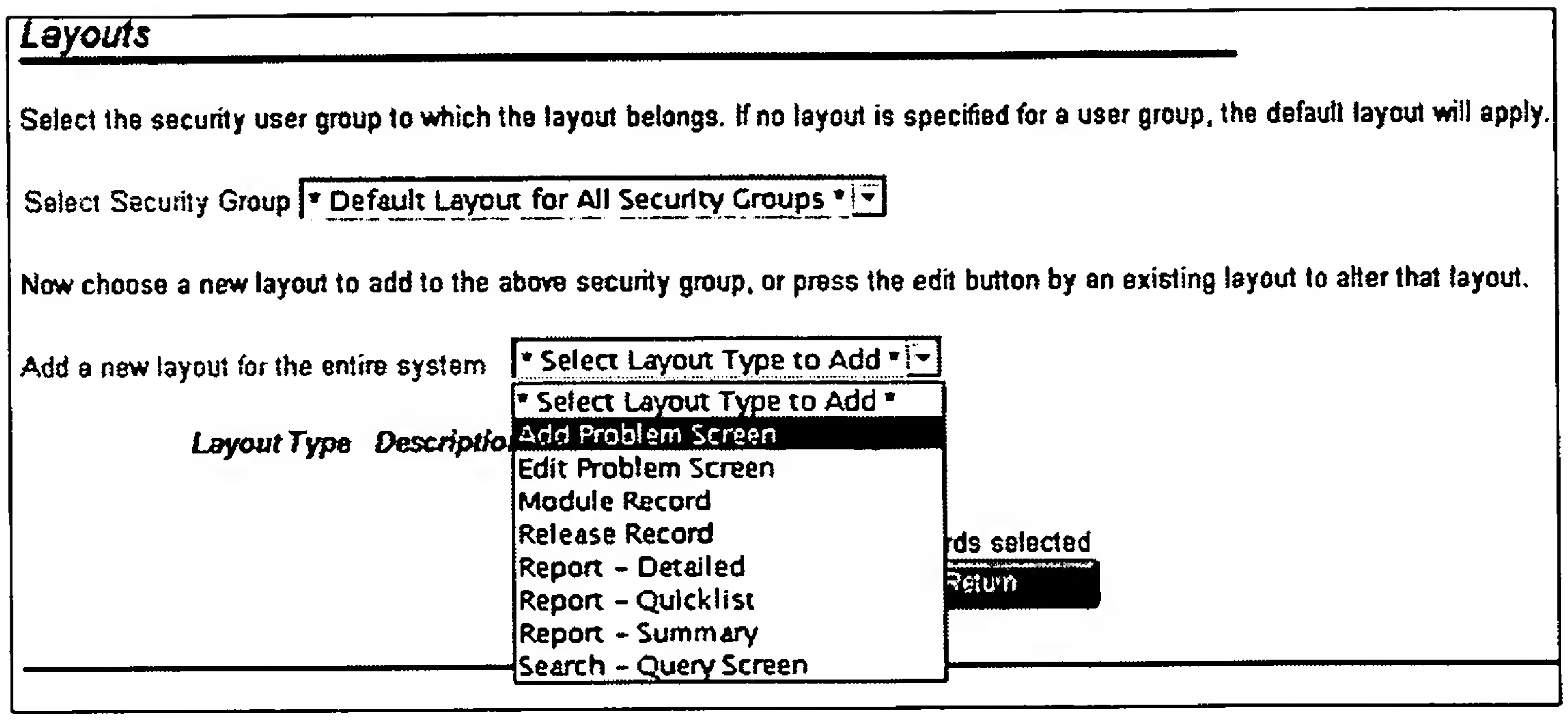
7. Continue adding fields to the Add Screen layout in the same manner.

   - Fields such as *Description* and *Comments* and any other "text area" fields are automatically set to span several rows, and can be dynamically increased or decreased on the actual screen that is created. This being the case, leave the Rowspan set to 1.

   - The fields that have been designated as "Required" appear in bold.

When you have finished adding fields and you have saved all of your changes click the **Return** button at the bottom of the screen to return to the main Layouts page.

You can design additional screen layouts for the Edit and Search screens by selecting **Edit** and **Search** from the dropdown list and following steps 4 to 8.



Adding Layouts screen

Creating Release and Module Layouts

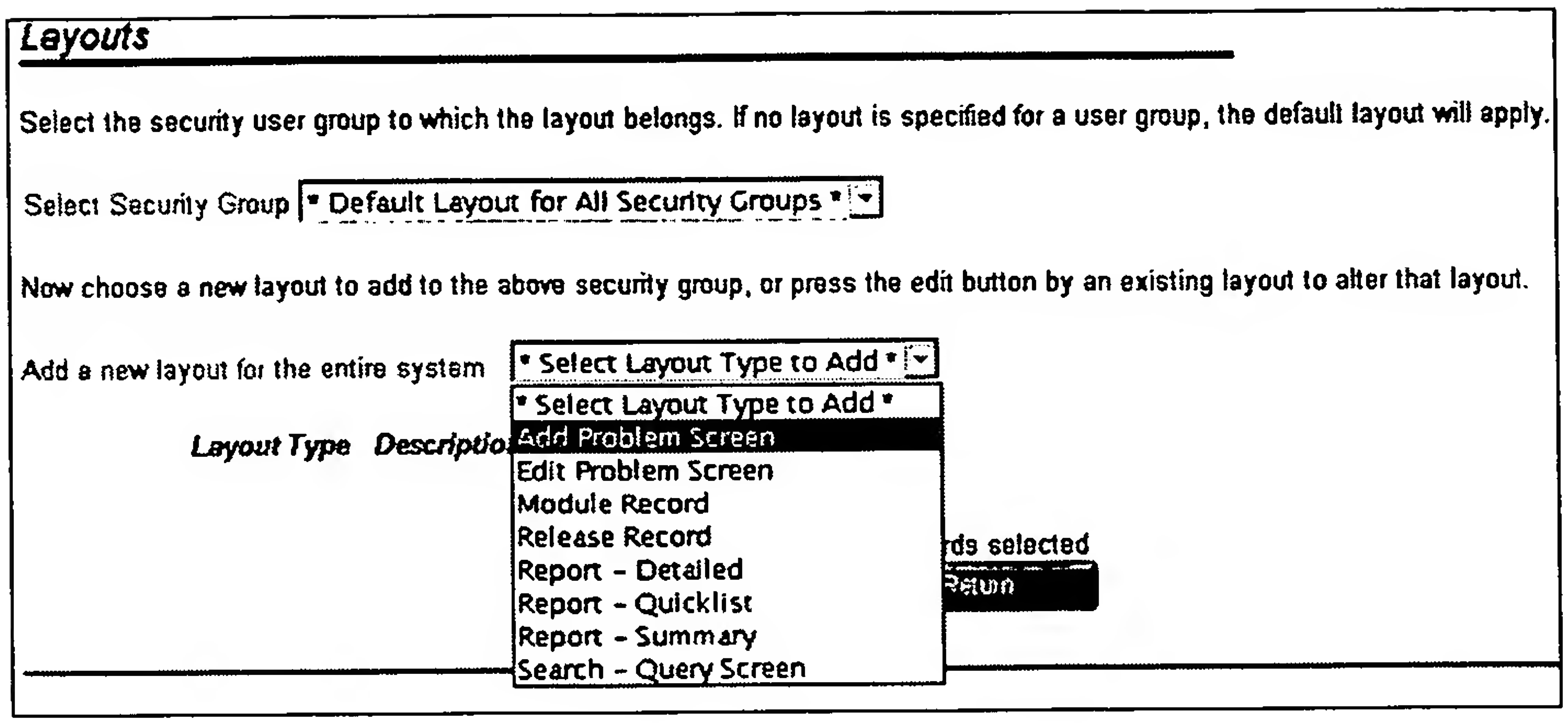
The Release and Module layout are special cases. These are not individual screens, but a screen layout embedded within another screen layout. Layouts can be designed that can be embedded within both the Add and Edit screens if desired. You should be aware that you should not create recursion by embedding a layout within itself. ExtraView will only allow layouts to be nested four levels deep to prevent this behavior.

Since issues can be tracked with ExtraView at the release or module level as well as at the problem level, release and module data is grouped in a "release row" or "module row" below the main problem data and above the long text areas, such as Description. After the single-row release or module layout is created, these fields will appear on the Add and Edit screens according to how the permissions are set in Grant Security Privileges.) This is discussed in detail in the next section.

For this example, we will use the Release Layout.

If you are planning on having fields with Release Information just do the following:

1. Click on Layout Editor from the Administration menu.
2. Select **Release Record** from the dropdown list.



Add Release Layouts

3. Add the fields that are appropriate to your install. These may include such things as:

    a. RELEASE_FOUND

    b. RELEASE_FIXED

    c. RELEASE_ASSIGNED_TO

    d. RELEASE_RESOLUTION

4. Save your current Layout by clicking the **Save Layout** button.

To Add the Release Layout to Appropriate Screens:

1. Click Administration and then Layout Editor.

2. For both the **Add** and **Edit** screen select LAYOUT.RELEASE from the dropdown list.

3. Choose the particular row that you want to add the release information to by selecting the row from the Row dropdown or by clicking the **Insert** button to insert a new row.

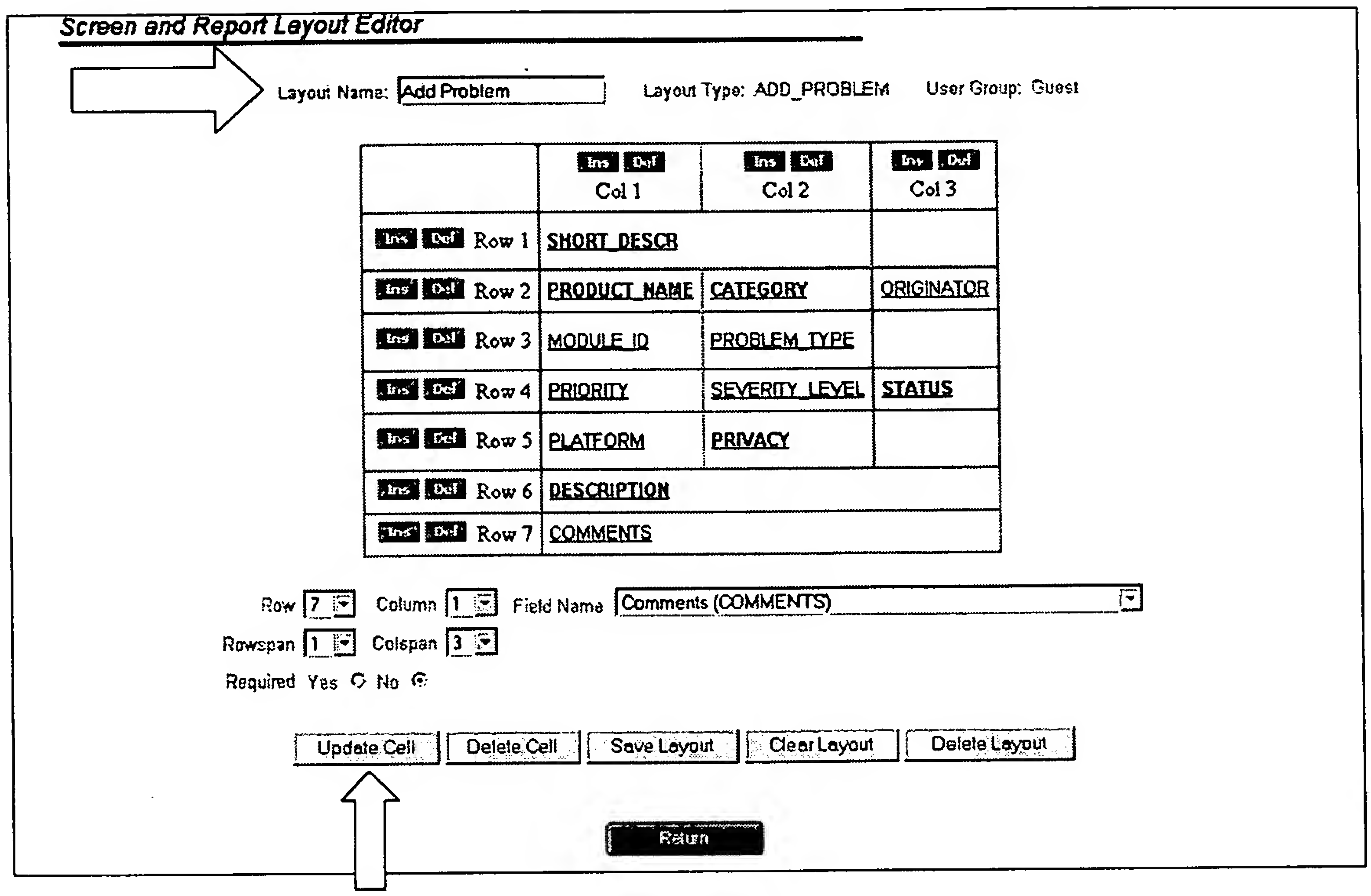
4. Save your changes and view your results.

Editing Fields

1. If you want to edit a particular cell, simply click on the field you want to edit.

2. You now have the ability to change the Rowspan, Colspan, Form Location or you can change the existing field with a completely different field.

3. Click the **Update Cell** button. Make sure you click **Save Layout** after each of your changes; otherwise changes will be lost when you leave this page.



Add Screen Layout

Deleting Fields

To delete a field:

1. Click on the particular field you want to delete.
2. Click the **Delete Cell** button.
3. Click **Save Layout.**

Clearing Layouts

To clear a layout:

1. Press the **Clear Layout** button
2. Press **Save Layout**

Deleting Layouts

To delete a layout:

1. Press the **Delete Layout** button.
2. Press **Save Layout.**

Allowed Value Types

Allowed Values serve two purposes for in your installation of ExtraView. It gives you the opportunity to sort your field lists in a non-natural sort way. For example, if you have a list of statuses as follows, they may be sorted as shown:

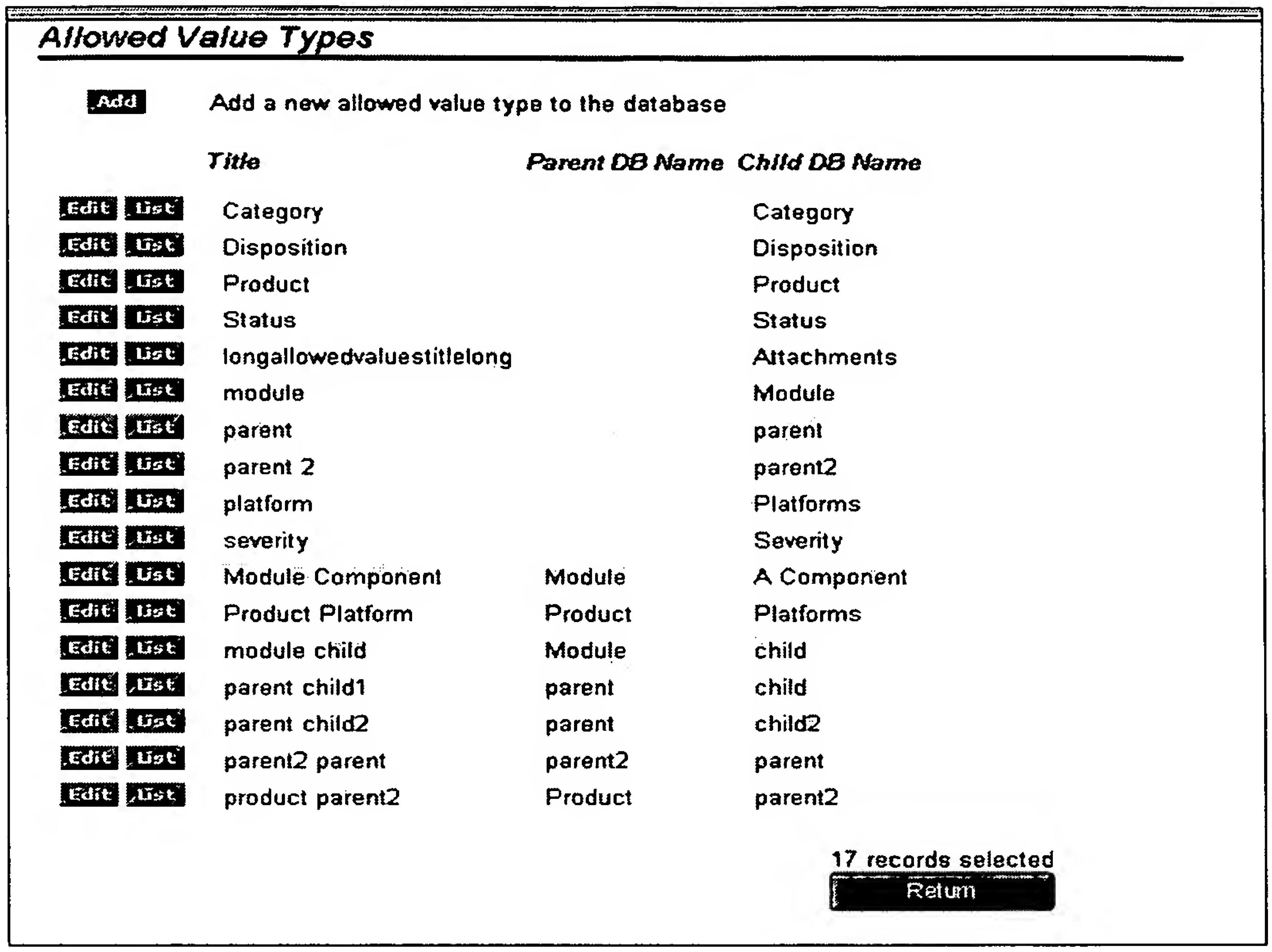
Natural Sort Order
Closed
Fixed
Open
Submitted

Sorting with an Allowed Value List
Submitted
Open
Fixed
Closed

Allowed Value Lists also gives you the opportunity to have certain lists dependent on individual values in other lists; for example, a list of specific *Platforms* may only be displayed if the connected parent *Product* is first selected.

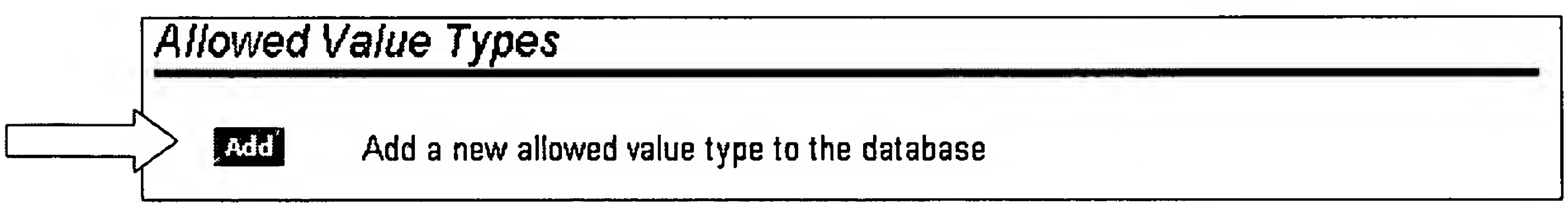
1. From the Administration menu, click **Allowed Values** under the Installation & Setup sub-section.

The following screen appears:



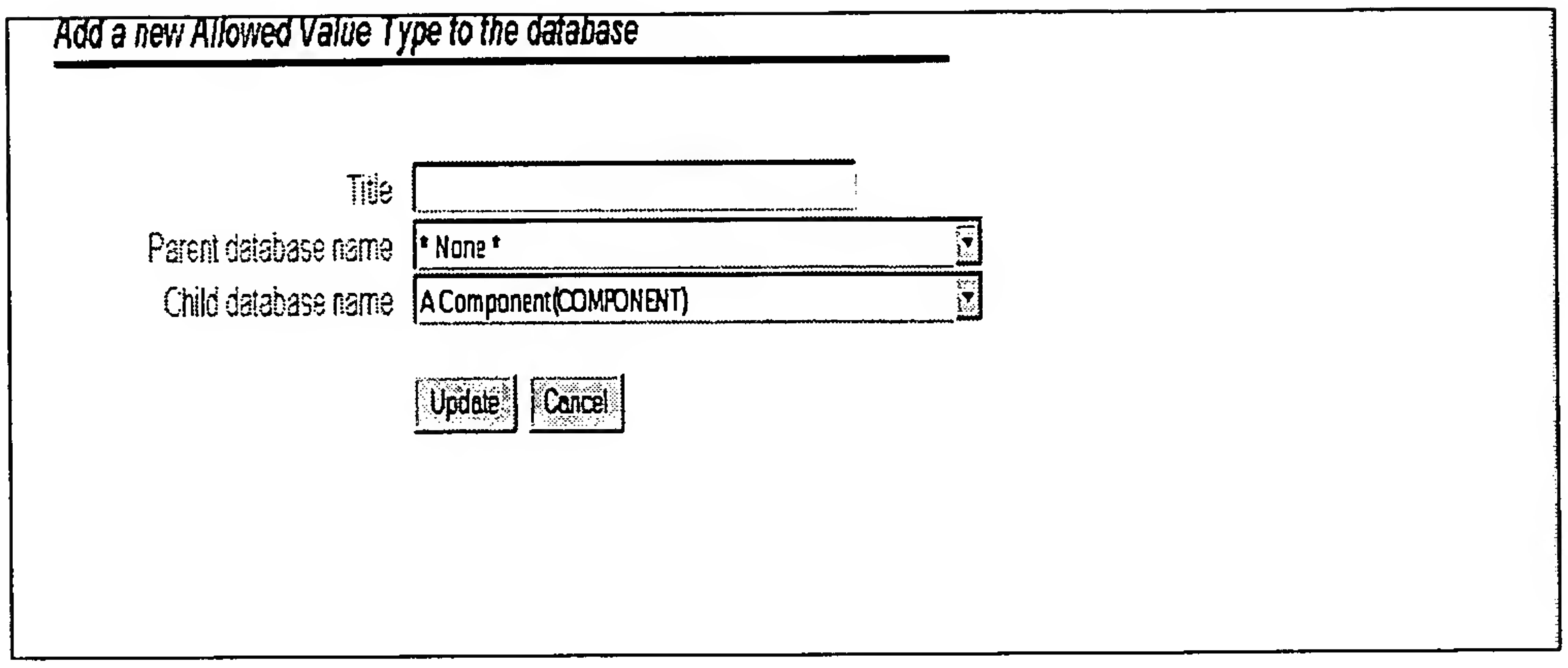
Allowed Value Types screen

2. To create a new Allowed Value Type, click the **Add** icon.



Adding a New Allowed Value Type

The following screen appears:

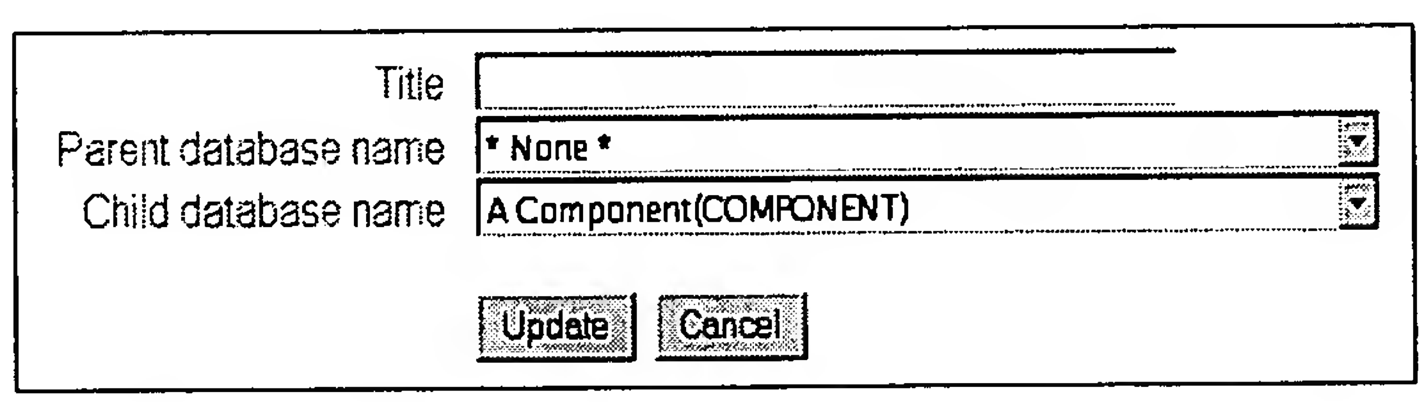


Add a new Allowed Value Type

3. The Title is whatever you wish to name your Allowed Value Type. If you wish to set up dependencies, select a Parent Database Name and a Child Database Name to establish an appropriate relationship.

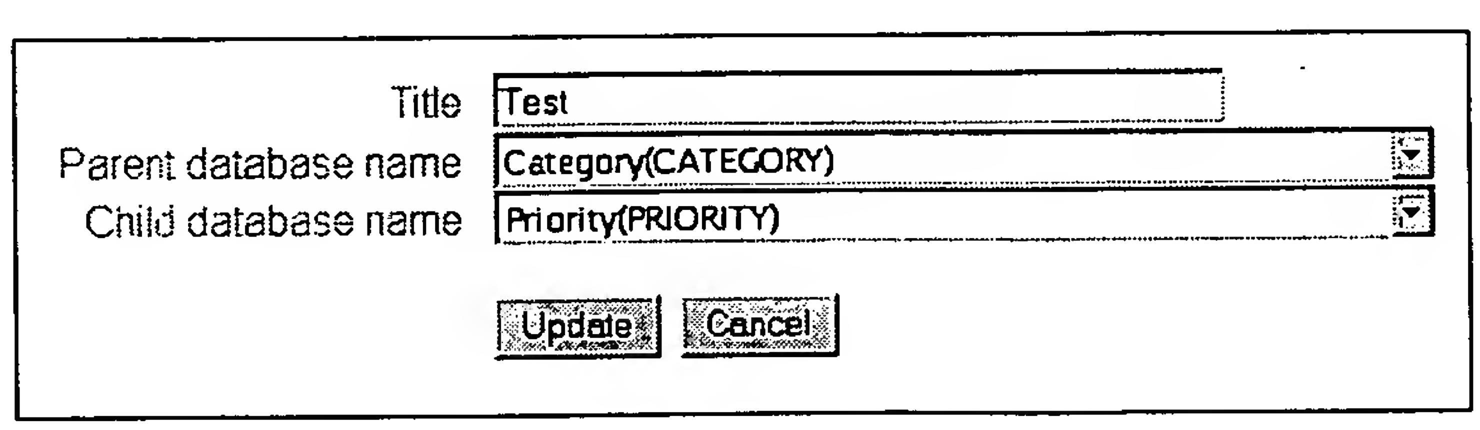
4. Click **Update** when finished.

   Alternatively, if you just want to specify the order in which elements in a list box appear see step below only select it as a Child value and click **Update**. Skip to Step 12 for more detailed instructions.



Adding a new Allowed Value Type

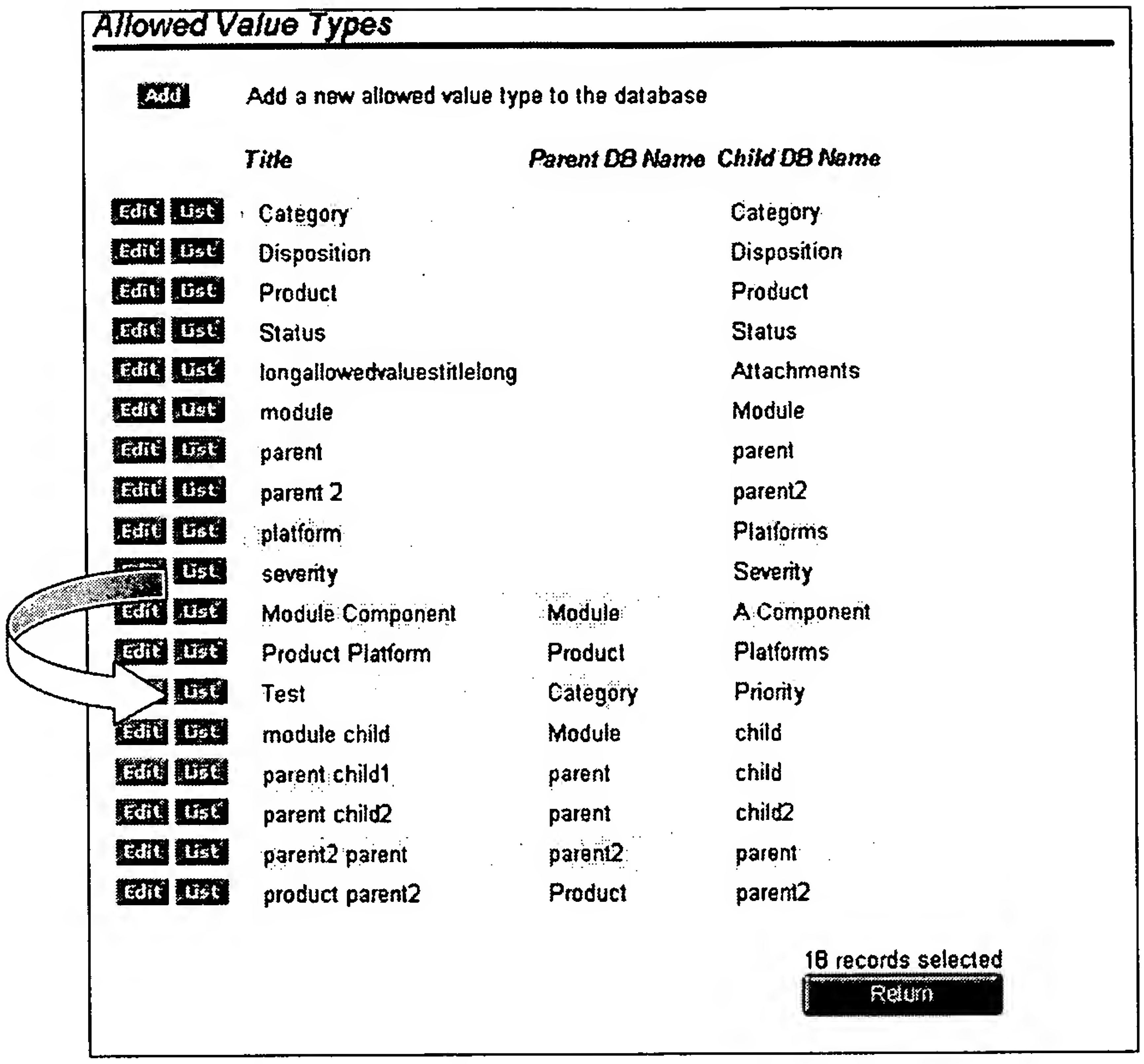
5. If you want to create a parent-child dependency between *Category* and *Priority* (using a sample Title of "*Test*"), do so as seen below:



Sample New Allowed Value Type

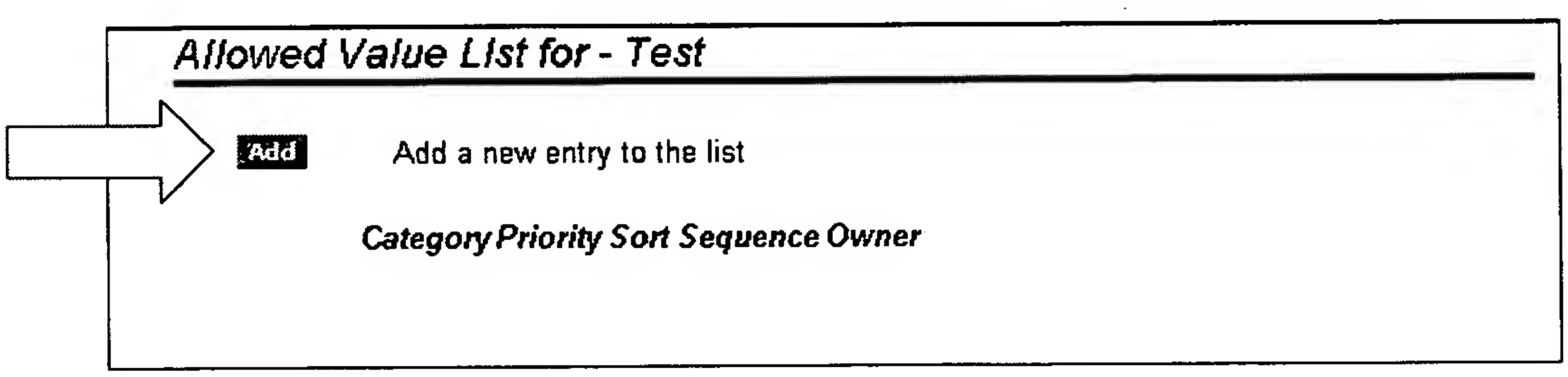
6. Click the **Update** button.

The following screen appears:



Sample Allowed Value Type

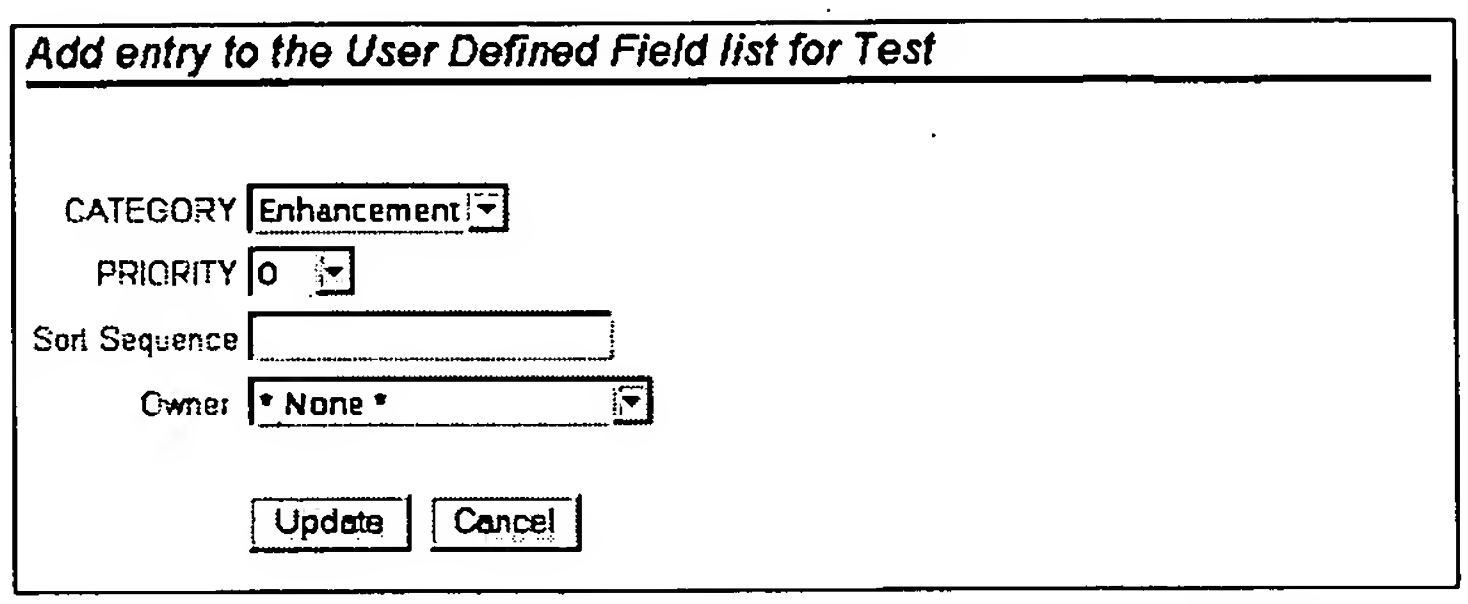
7. Now that you have the dependency established, you can specify the details, i.e. what *Priority* will appear in a list box based on a selected *Category*. To do this, click the **List** icon next to the applicable Allowed Value Title. On the following screen click the **Add** icon.



Allowed Value List

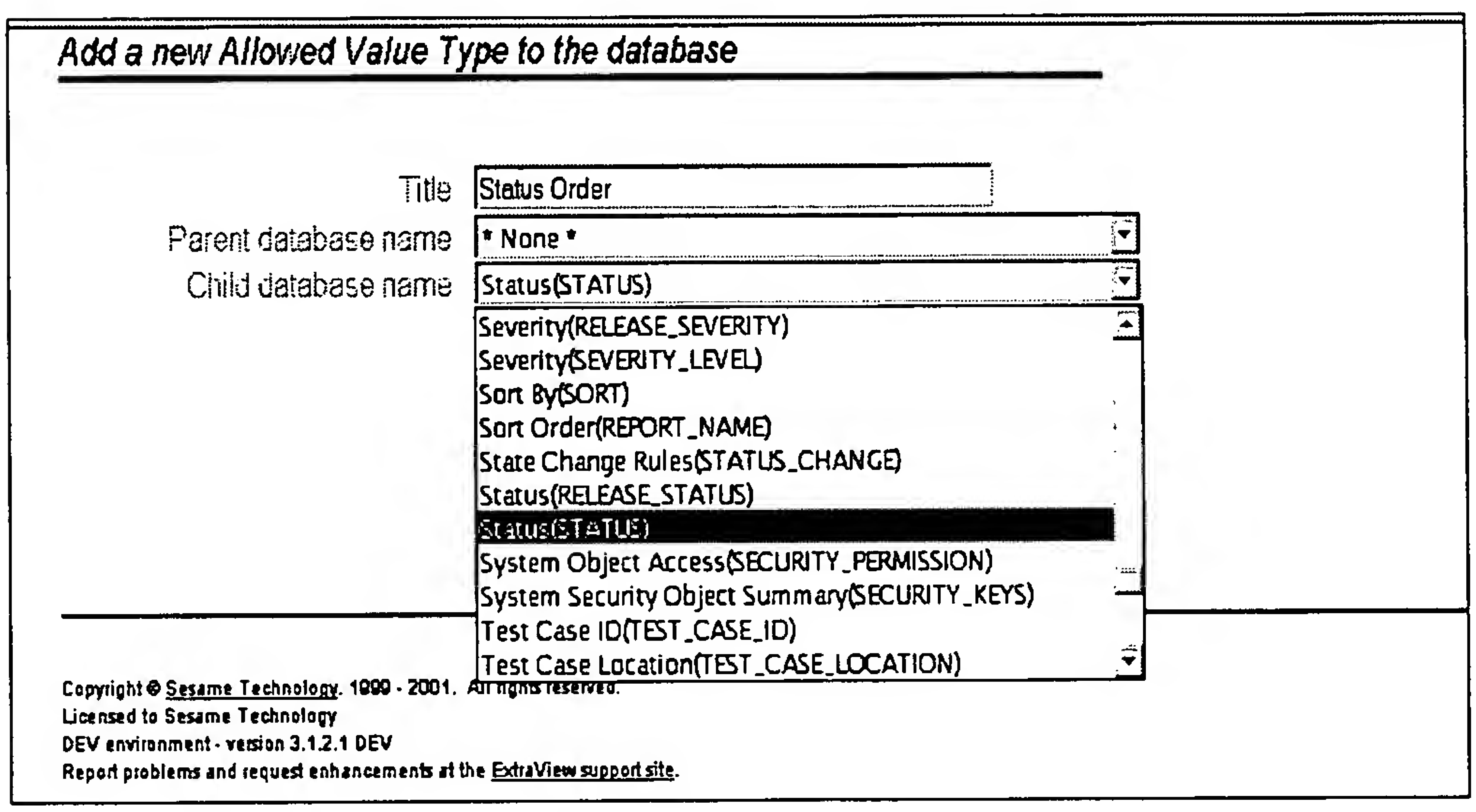
8. Select an item from the Category (Parent) list, and an item from the Priority (Child) list. If you wish, you can control the order in which items appear in the list box by entering an integer value in the Sort Sequence text box.

9. Click **Update** and repeat steps 10 and 11 for each Child value you want to appear for each Parent item.



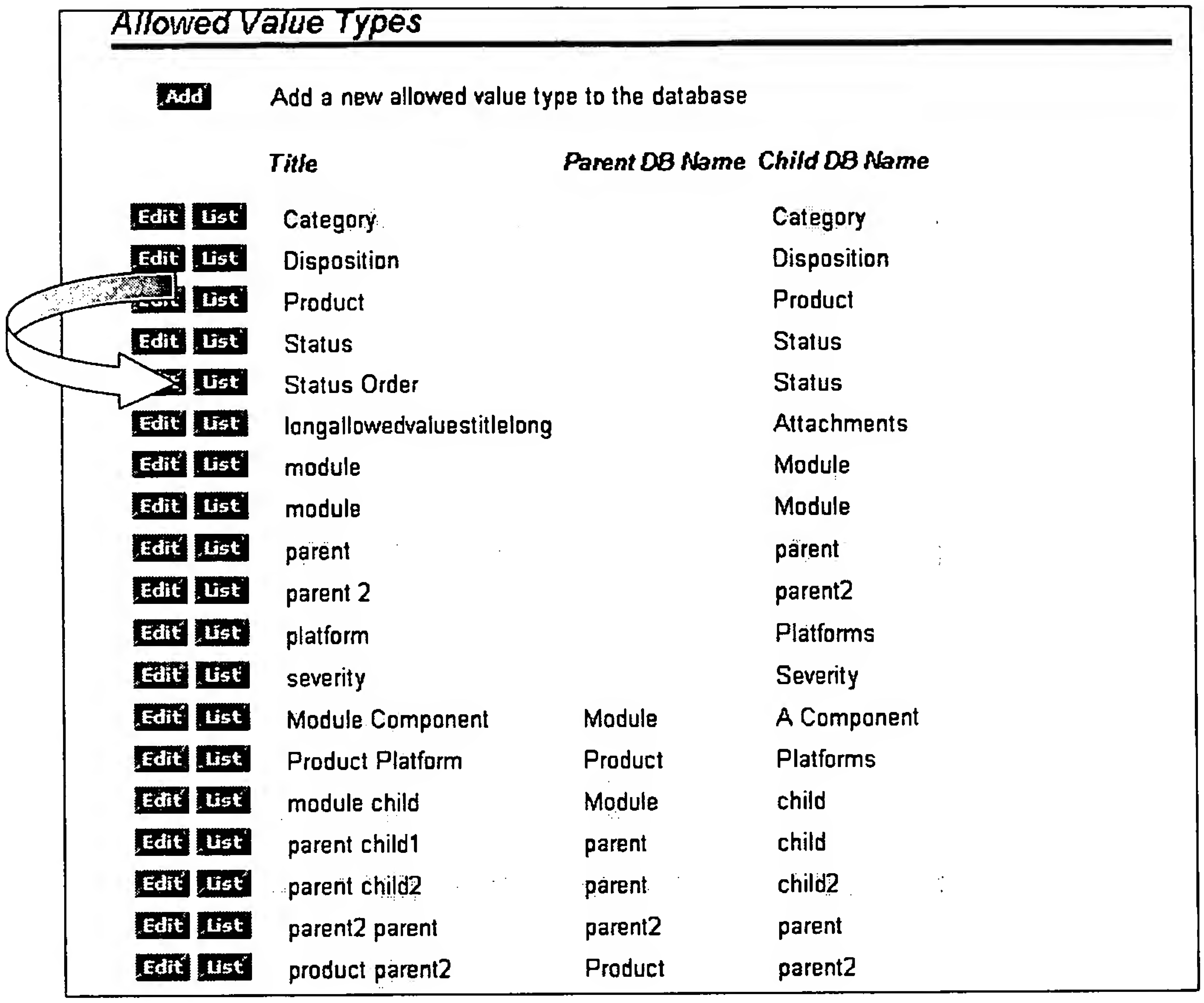
Adding to the Allowed Value List

10. If you want to set up a sort sequence for a field, for example: if you want to specify the order in which the items in *Status* appear, then follow steps 1, 2, and 3 as above. Once you reach the Add a New Allowed Value Type screen, specify a Title and the Child Database Name that correspond to the field you are setting the sort sequence. (For this example, *Status*).



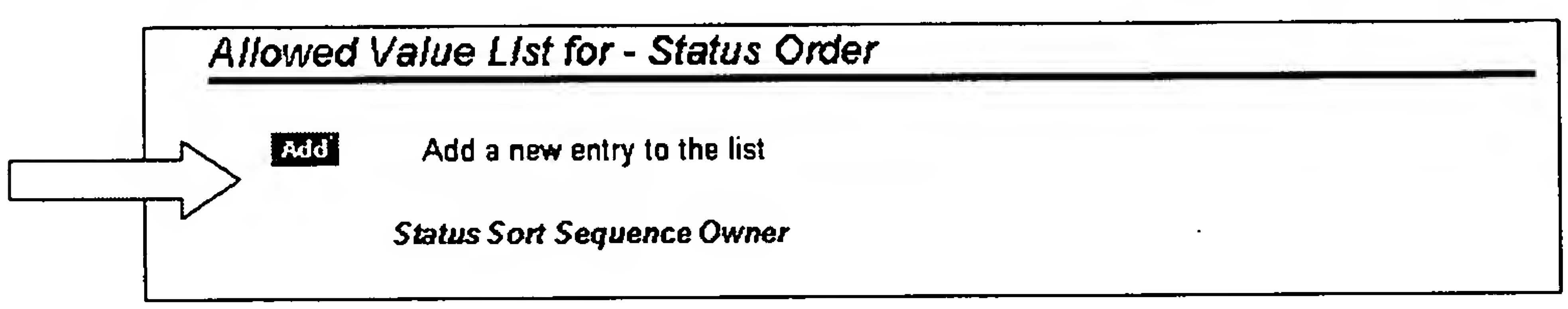
Adding a Sort Sequence to Status

11. After clicking on **Update,** you are returned to the Allowed Value Types screen. Click the **List** icon next to the Allowed Value title you want the sort sequence set on, in this case *Status Order*.



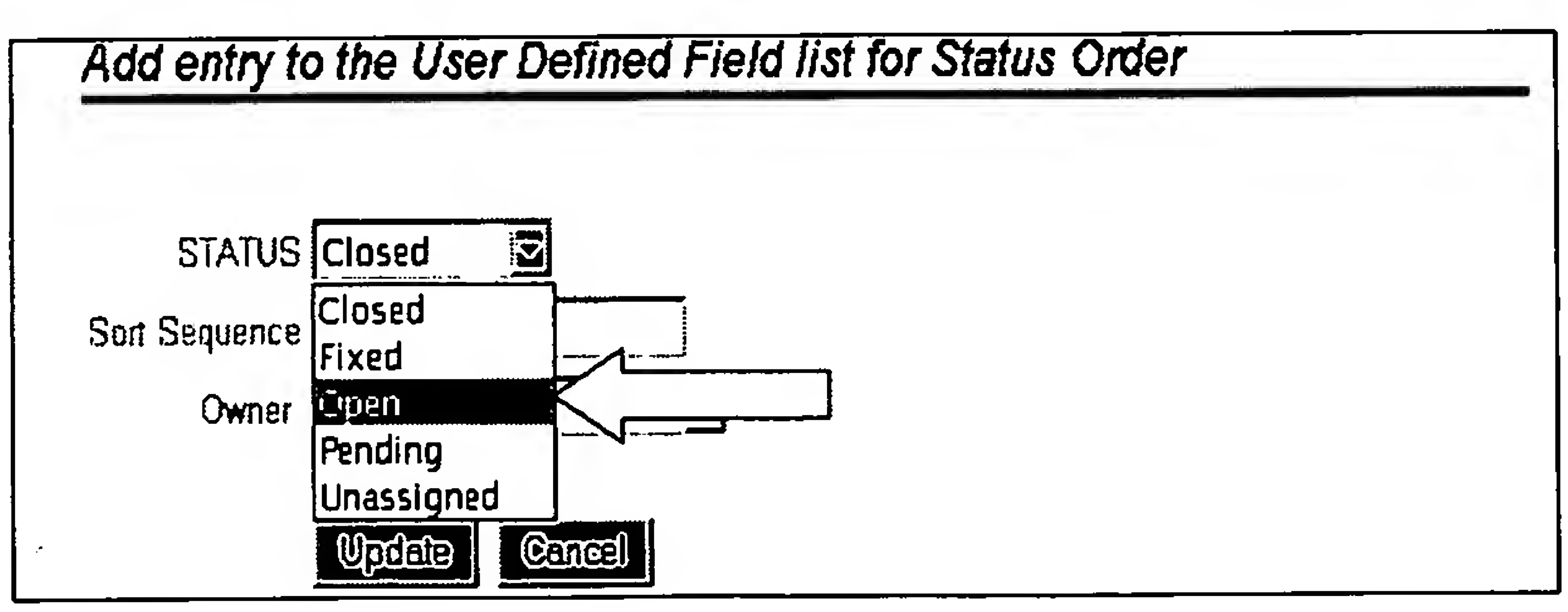
Allowed Value Types screen

12. Click the **Add** icon on the following screen:



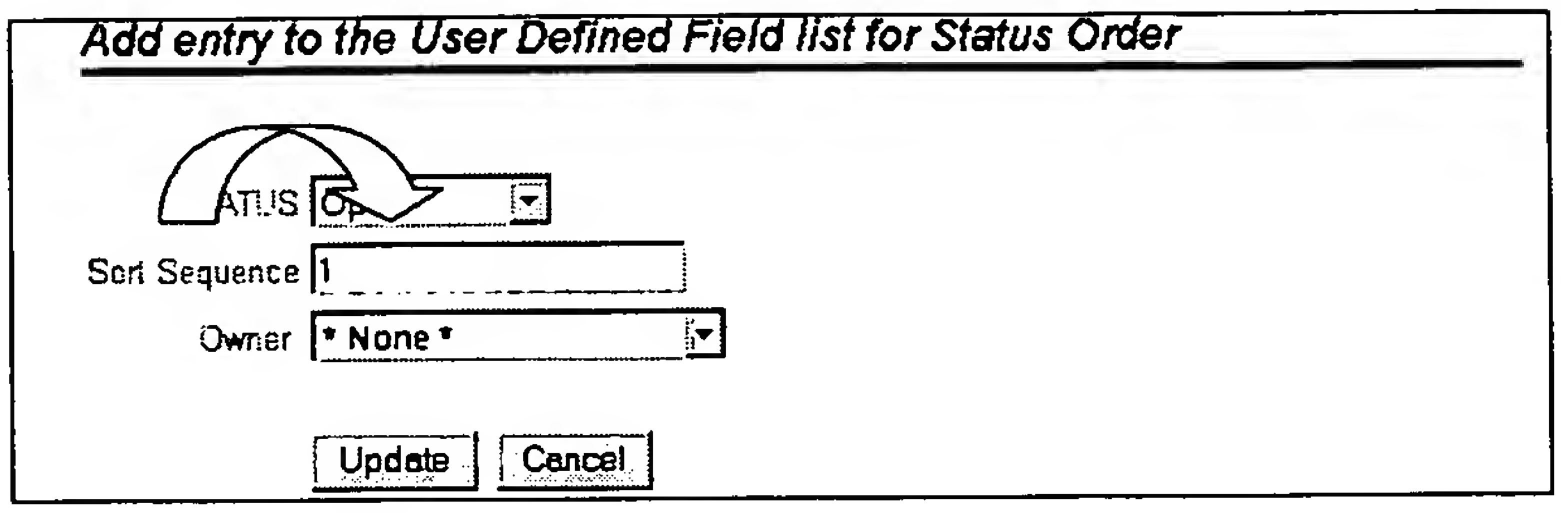
Editing Allowed Value List

13. Select an item from the **Status** dropdown menu.



Selecting the First Sort Item

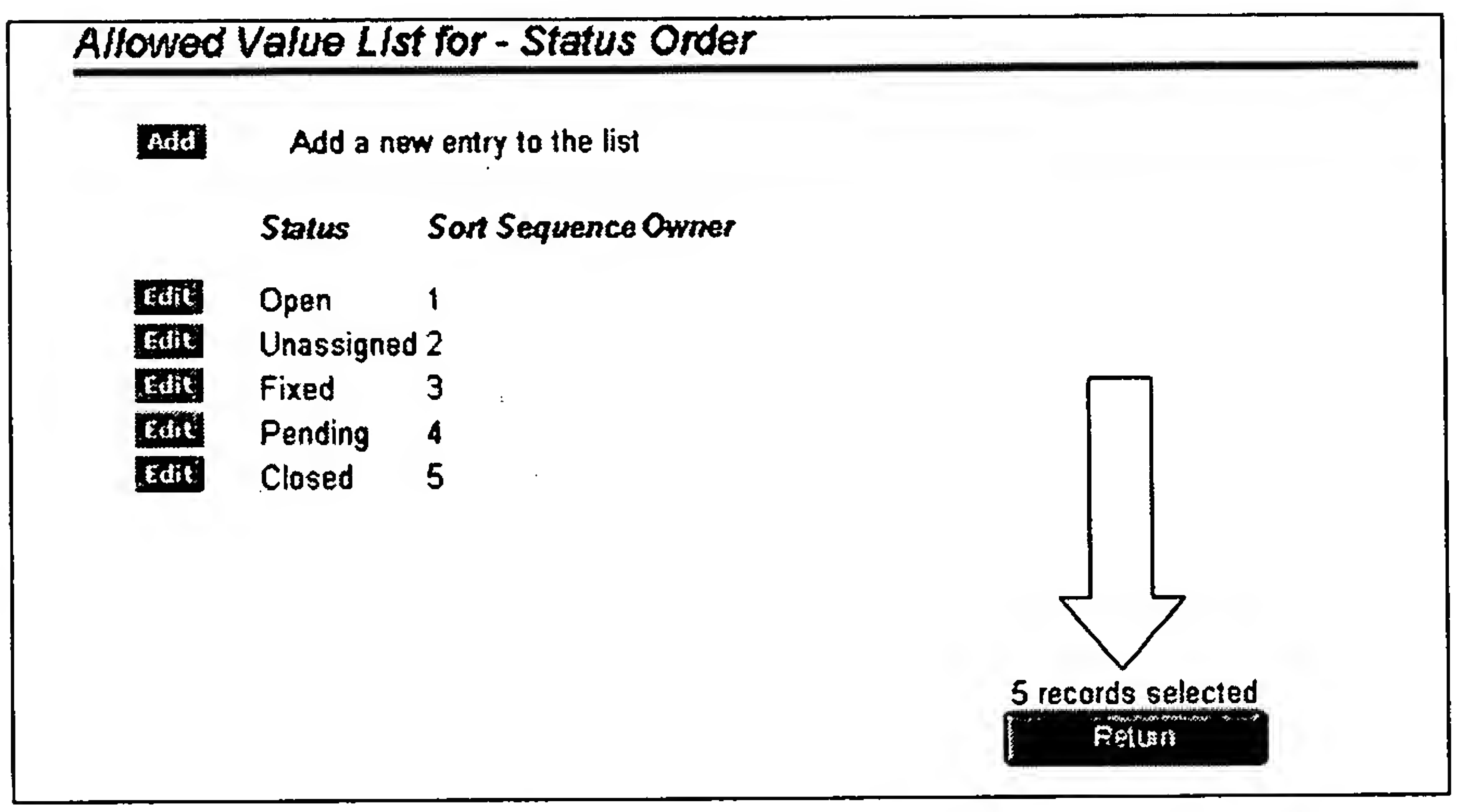
14. Specify an integer value in the **Sort Sequence** text box.



Setting the Sort Sequence

15. Click **Update**, and repeat these three steps until completed.

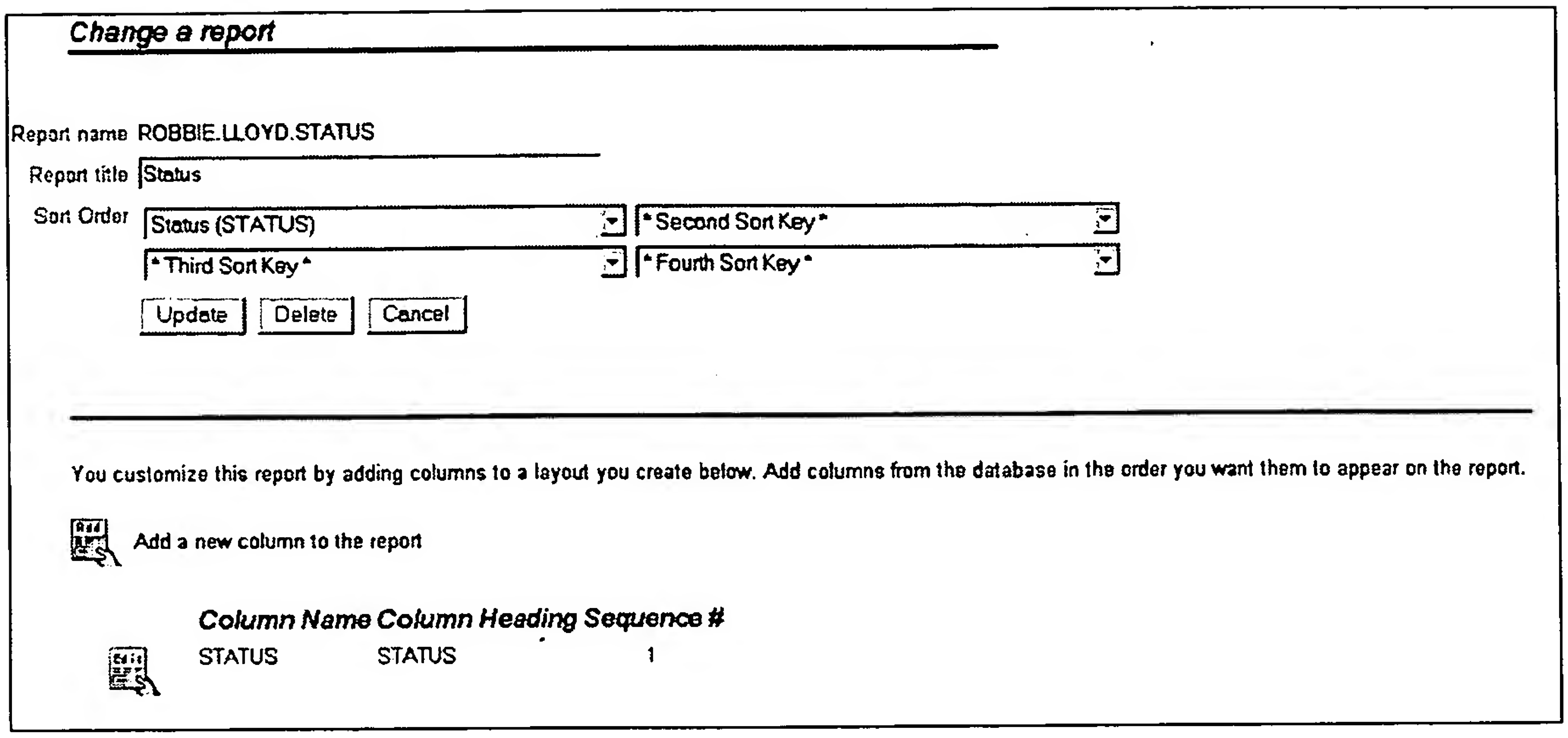
16. Click **Return**.



Completed Sort Sequence List

User and System Wide Reports

These custom reports are generated through the Administration screen or from the Additional reports option on the Search screen. System Wide Reports are reports constructed by an ExtraView Administrator and are available to all of the ExtraView users, while User Reports are created by individual users, for personal queries.



Change a Report Screen

To create User or System Wide Reports do the following:

1. From the Search/Report screen click the **Additional Reports** button.
2. From the Administration screen click either the **User** or **System Wide Reports** button.
3. To View any of the existing reports just click the **View** button next to the report.
4. To create your own report click the **Add a new personal report** button.
5. Fill in Report Name and Report Title. When adding the report name do not add any special characters or spaces, this is only the database name so it will not be viewable, the report title can contain spaces or special characters.
6. Select the **Sort Order** keys for your report and press update.
7. Next you must add columns to your report by pressing the **Edit** button next to the report you just created, proceed to add as many columns as you please.

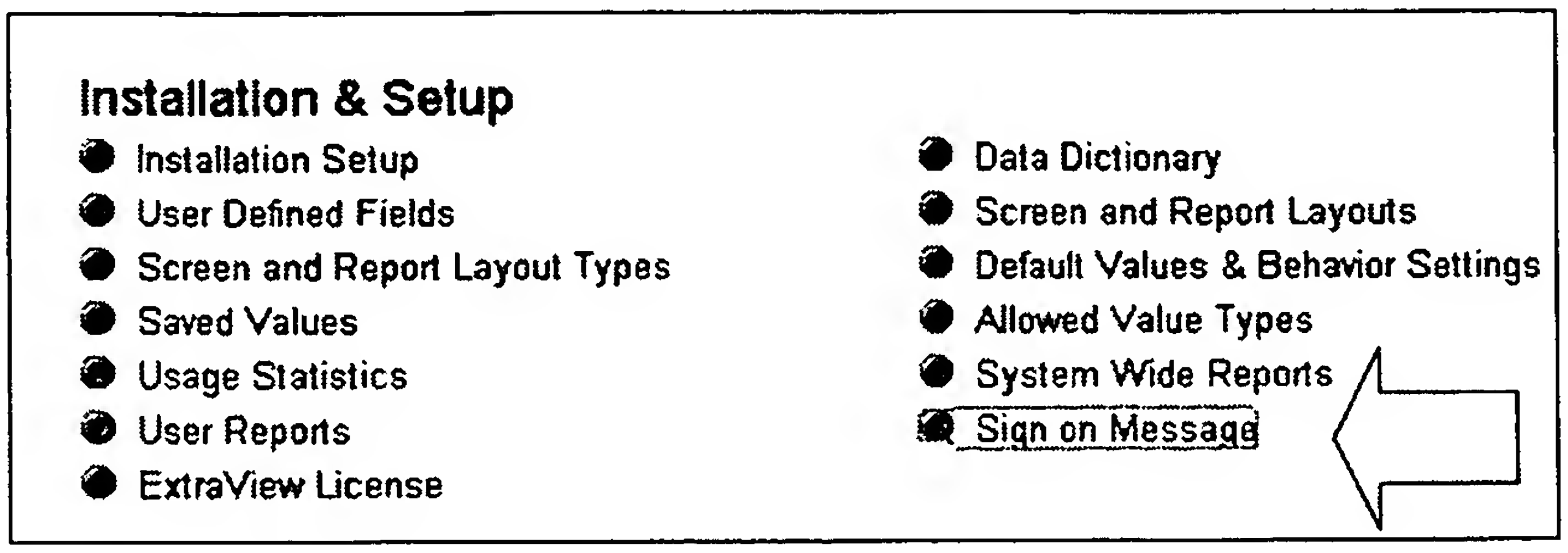
To view this report:

1. From the Search Report screen click Additional Reports and then click the View button next to the report you just created.

   Note: A system wide or user report without columns will not appear on your Additional Reports Page until you add columns. It will appear in the Sort Order drop down box so you are able to run Summary, Detailed, or Quick list reports on these sorts.

Sign On Message

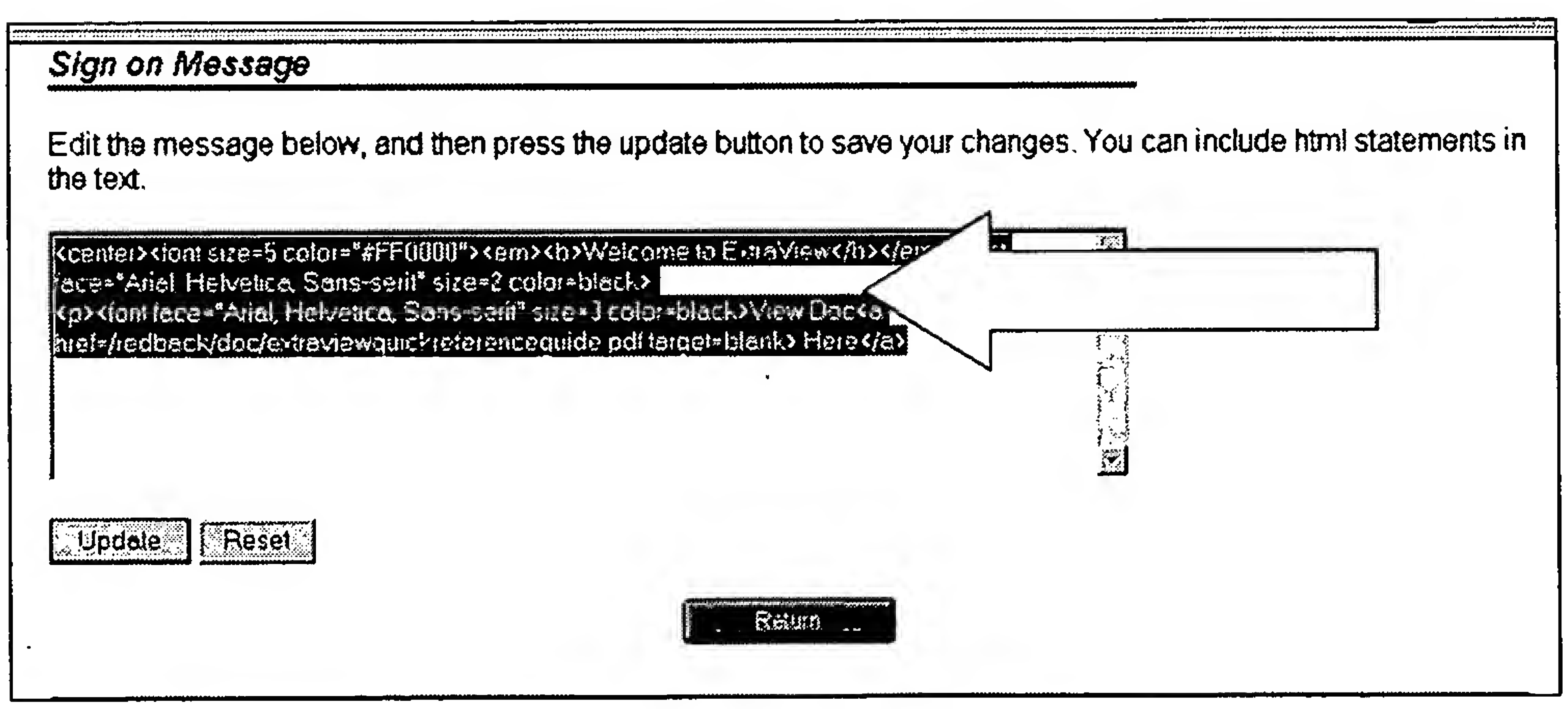
Many organizations use the Sign on Message screen as a bulletin board for their organization (system-wide messaging). You are able to use all the conventions of HTML to customize your own Sign on Message.



To create your company's personalized Sign on Message:

1. From the administration menu, under Installation and Setup, click on **Sign on Message**.

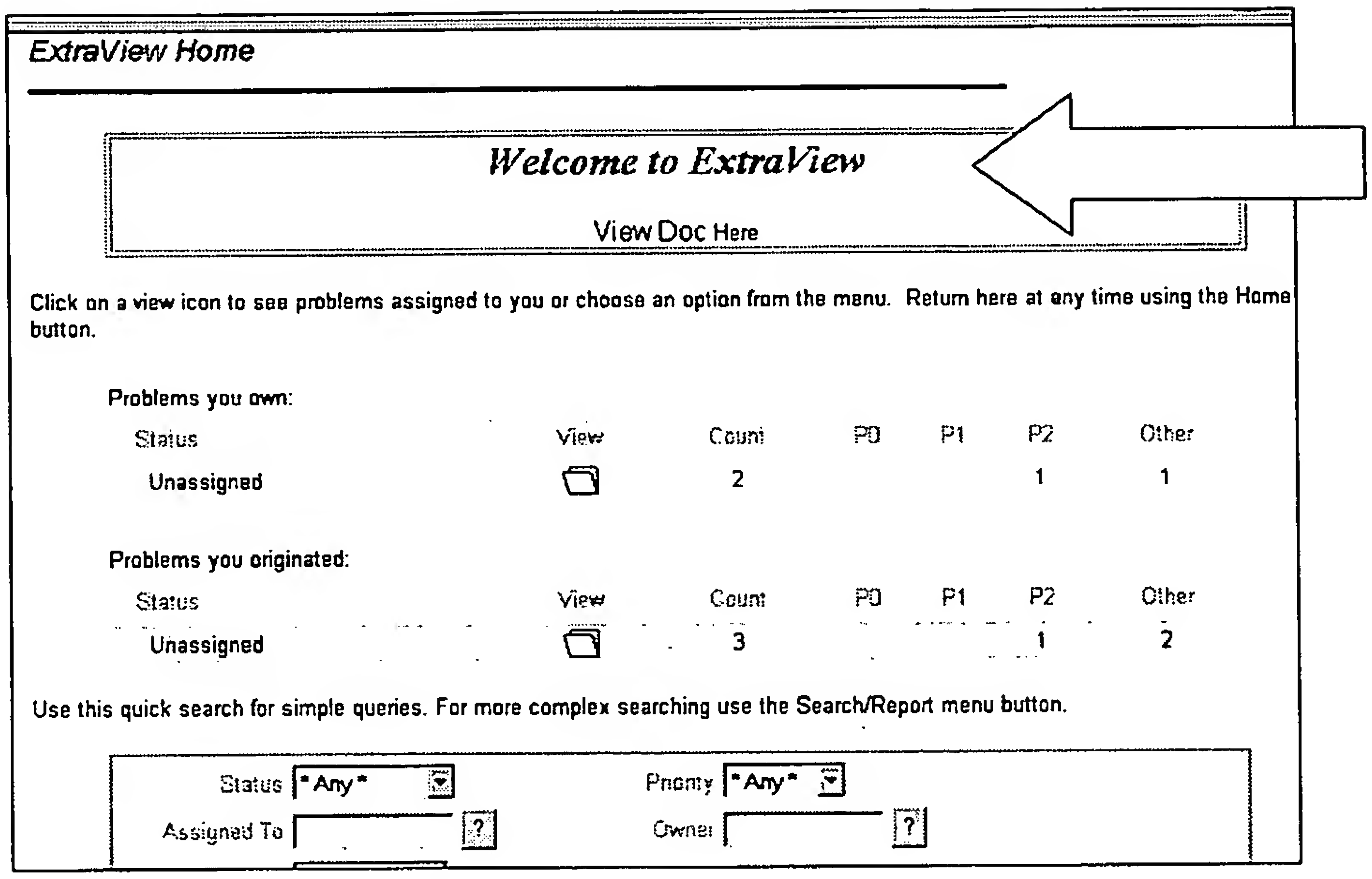
The following screen appears:



Sign On Message screen

2. You can modify the Sign on Message in any manner. This screen allows you to display HTML on the home screen at the top of the page. When you are finished press the **Update** button.

Below is an example of a Home screen with the Sign on Message:



Home Page screen

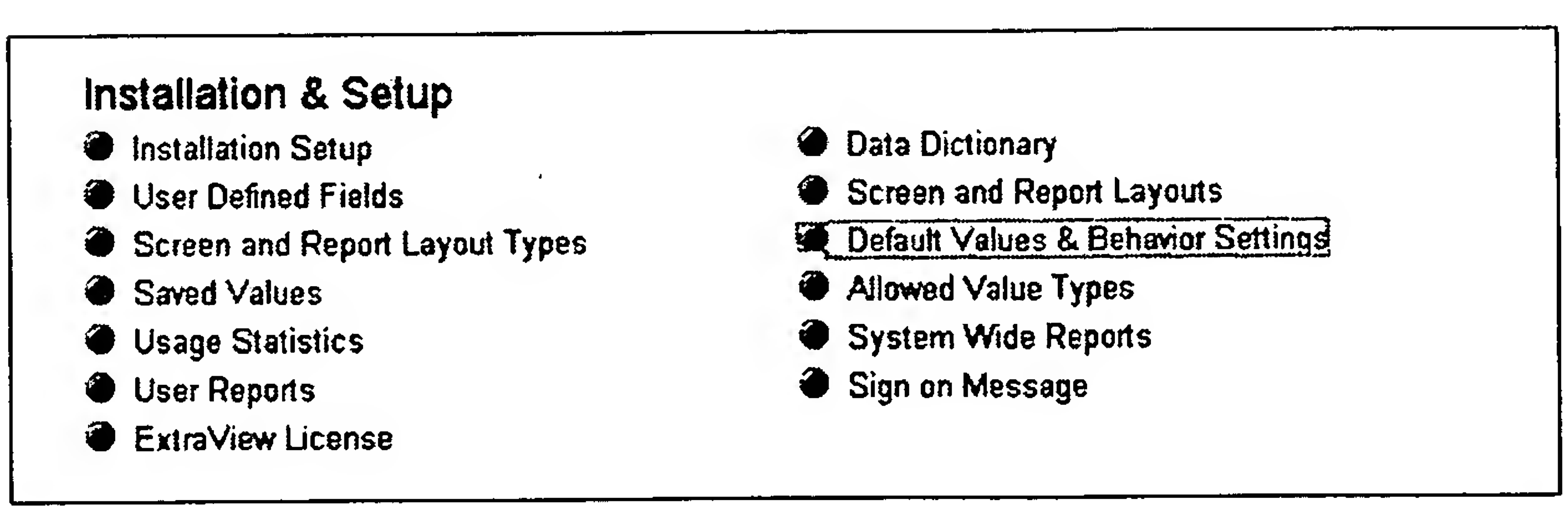
Behavior Settings

The following topics will help you control behavior within ExtraView in order to better suit your company.

Default Values & Behavior Settings (Application Defaults)

This screen gives you the option of editing existing Default Values & Behavior Settings. New values cannot be added from this screen; the specified user is only allowed to change the Value and the Description.

1. Default Values & Behavior Settings are found under the Installation & Setup sub-heading on the Administration menu.



Installation & Setup Section

2. Clicking on Default Values & Behavior Settings brings up screen similar to the following:

Installation Setup - Default Values & Behavior Settings

	Database field name	Value	Description
Edit	DEFAULT_USER_GROUP	GUEST	
Edit	IGNORE_USER_GROUP	GUEST	This user group doesn't own and cannot be assigned problems
Edit	DEFAULT_STATUS	UNASSIGNED	Default Status if none visible
Edit	DEFAULT_CATEGORY	SOFTWARE	Default category in the add problem screen
Edit	DEFAULT_PRIVACY	PRIVATE	Default privacy setting when adding problems
Edit	STATUS_CLOSED_NAME	CLOSED	Name of the closed status of a problem.
Edit	DEFAULT_TEXT_REPORT_DELIMITER	:	Single character to place between data fields
Edit	FILTER_MODULE_BY_CATEGORY	NO	Allow filtering of modules by category (YES/NO)
Edit	LINK_MODULE_OWNER_ASSIGNED_TO	Yes	Link the module owner field to the assigned to field
Edit	ENFORCE_STATE_CHANGE_RULES	YES	
Edit	ENABLE_PRIVACY_GROUPS	YES	Enables Privacy Group based data security.
Edit	SEPARATE_WORK_FLOW	NONE	Allow separate work flows per USERGROUP or PRODUCT or NONE
Edit	ADMIN_BYPASS_GROUP	ADMIN	Name of group with state change override privileges.
Edit	REPORT_COUNT_METHOD	PROBLEM	PROBLEM, MODULE or RELEASE
Edit	STATUS_TRACKING_METHOD	PROBLEM	PROBLEM or RELEASE
Edit	ALLOW_UNLIMITED_SEARCH	NO	Allows unlimited rows to be returned on queries
Edit	LIMIT_WORD_RECORDS	100	Max number of records returned from a search to a MS Word report
Edit	LIMIT_WORD_DETAILED_RECORDS	25	Max. number of detailed records on a MS Word report
Edit	ABRREVIATED_HOME_PAGE	YES	Display the searchable home page or the abbreviated version
Edit	SORT_PRODUCT		
Edit	SORT_MODULE		
Edit	SORT_UDF		
Edit	SORT_SEVERITY		

Default Values & Behavior Settings screen

3. Clicking the **Edit** icon next to an item allows you to make changes to the default settings. For example, this is the screen for editing IGNORE_USER_GROUP:

4. For each Application Default you want to edit just change the Description and or Value and press **update**.

Change entry in the installation details table

Fixed database name	IGNORE_USER_GROUP
Description	This user group doesn't own and cannot be assigned problems
Value	GUEST

[Update] [Cancel]

Editing a Default Value

The following table includes all of the Application Defaults that are editable by the System Administrator, organized by Application Default Name, a sample Value and a Description.

Application Default	**Value**	**Description**
DEFAULT_USER_GROUP	GUEST	User Group for User Self-Registration.
IGNORE_USER_GROUP	GUEST	This user group doesn't own and cannot be assigned problems
DEFAULT_STATUS	UNASSIGNED	Default *Status* if none visible
DEFAULT_CATEGORY	SOFTWARE	Default category in the add problem screen
DEFAULT_PRIVACY	Private	Default privacy setting when adding problems
STATUS_CLOSED_NAME	Closed	This feature allows users to specify what their nomenclature for Closed is. This is vital for using the ALLOWED_EDIT_CLOSED feature.
DEFAULT_TEXT_REPORT_DELIMITER	:	Single character to place between data fields
FILTER_MODULE_BY_CATEGORY	NO	If you would like your *Modules* to be based on particular *Categories* as well as *Products* set this value to YES. When you add *Modules* in the Configuration section, you will have the opportunity to associate the *Module* with a particular *Category*.
LINK_MODULE_OWNER_ASSIGNED_TO	YES	Automatically populates Assigned to field with the appropriate Module Owner.
ENFORCE_STATE_CHANGE_RULES	NO	Ability to turn these rules on or off.
ENABLE_PRIVACY_GROUPS	YES	This turns n the functionality to utilize Privacy Groups (see the section on Security).
SEPARATE_WORKFLOW	USERGROUP	This allows you to enforce State Change Rules based on PRODUCT, USERGROUPS or NONE.
ADMIN_BYPASS_GROUP	ADMIN	The Group to bypass State Change Rules.
REPORT_COUNT_METHOD	RELEASE	You can keep track of ExtraView issues by PROBLEM, MODULE or RELEASE
STATUS_TRACKING_METHOD	RELEASE	You can keep track of the status of ExtraView issues by PROBLEM, MODULE or RELEASE
ALLOW_UNLIMITED_SEARCH	YES	Allows unlimited rows to be returned on queries
LIMIT_WORD_RECORDS	100	The maximum number of MS Word Records that can be outputted for reporting purposes.
LIMIT_WORD_DETAILED_RECORDS	25	The maximum number of MS Word detailed reports that can be returned.
ABBREVIATED_HOME_PAGE	YES	This indicates whether you have a standard home page (YES) or a Customized Home Page (NO).
USER_SELF_REGISTRATION	NO	Allow users to register themselves from the sign on screen
ENFORCE_DETAILED_USER_INFO	YES	By being set to YES this makes nearly all of the fields on the User Registration screen required.
STRICT_PASSWORDS	YES	Require passwords to be at least 6 chars with 1 non-alpha char.
SESSION_EXPIRE_TIME_HOURS	24	Idle time before a user is forced to sign back on to the system.
PASSWORD_EXPIRE_TIME_DAYS	10	Days before a user has to establish a new password.

SUPPORT_LINK	support@sesame.com	Simple HTML used to show the support link at the bottom of each page.
USER_LIST_SIZE	25	This field holds the value for the number of users in a selection list before it is broken down and grouped by letter, user group or name. This applies to Pop Up text boxes and to the User Accounts screen.
EMAIL_NOTIFICATION	YES	Turn on Email Notification of changes (YES/NO)
EMAIL_DIRECTORY	/oracle/ExtraView/mailbox	Email Directory for outgoing messages to be stored
EMAIL_FROM_USER_ID	ExtraView.dev@sesame.com	Return address for all email
EMAIL_FROM_USER_NAME	*ExtraView*	Alias for the real user name that email originates from
EMAIL_MODULE_OWNER_ALWAYS	Yes	Option to send email to the Module Owner.
EMAIL_SUBJECT_TEMPLATE	[$$ID$$] $$SHORT_DESC$$	This allows users to customize their email subject line. The email section has detailed instructions on how to alter this.
DEFAULT_USER_FOR_EMAIL	SYSTEM	User to receive email when a problem is not assigned to anyone
OWNER.TYPE	TEXT	Allows the value to be accessible through a list or a pop up text box.
ASSIGNED_TO.TYPE	TEXT	Allows the value to be accessible through a list or a pop up text box.
RELEASE_FOUND.TYPE	TEXT	Allows the value to be accessible through a list or a pop up text box.
RELEASE_FIXED.TYPE	TEXT	Allows the value to be accessible through a list or a pop up text box.

Some of the above Application Defaults that are commonly altered include:

- DEFAULT_STATUS – You can set this to any status that you have in your status list
- DEFAULT_CATEGORY - You can set this to any category that you have.
- DEFAULT_PRODUCT - You can set this to any product that you have.
- DEFAULT_PRIVACY - You can set this to either Private or Public.
- ENFORCE_STATE_CHANGE_RULES – Gives you the opportunity to turn State Change Rules on or off.
- USER_SELF_REGISTRATION – You can allow your users to self-register, or you can be the registrar.
- SUPPORT_LINK – If you have an HTML page that you would like your users to go to you can put the link here.
- EMAIL_FROM_USER_ID – for example; *ExtraView*@yourcompany.com
- EMAIL_SUBJECT_TEMPLATE – This allows you to use fields within the record and place them within the subject line of the email that is generated. The field that you want to include is enclosed between $$ and $$. For example, the problem title is $$SHORT_DESCR$$.
- USERNAME_DISPLAY – You have the ability to display usernames by First, Last or by ID based on your company's methodology.

Viewing Usage Statistics

In order to efficiently conduct business, vital information must be recorded and analyzed with the intention of perfecting the development process. Usage Statistics can be accessed via the Administration menu, under the Installation & Setup heading.

1. Clicking on **Usage Statistics** brings up the following page:

Usage Statistics

Report prepared August 17, 2001 11:08

User Statistics

Number of users	473
Number of active users	470
Number of active customer users	9
Number of internal users	461
Number of active users in group *Administrator*	38
Number of active users in group *Development Manager*	11
Number of active users in group *Engineer*	441
Number of active users in group *Guest*	14
Number of active users in group *Management*	1
Number of active users in group *Zephyr Contracting*	1
Number of active users in group *QA Engineers*	8
Number of active users in group *QA Manager*	6
Number of active users in group *Release Management*	5
Number of active users in group *TAC Engineer*	5
Number of active users in group *TAC Manager*	4
Number of active users in group *Tech. Pubs. Manager*	4
Number of active users in group *Technical Writer*	2
Number of active users in group *Testing*	2

The page is divided into 3 main sections: User Statistics, Problem Statistics, and File Attachments.

User Statistics	
Number of users	467
Number of active users	463
Number of active customer users	11
Number of internal users	452
Number of active users in group *Administrator*	32
Number of active users in group *Development Manager*	9
Number of active users in group *Engineer*	429
Number of active users in group *Guest*	12
Number of active users in group *QA Engineer*	3
Number of active users in group *QA Manager*	3
Number of active users in group *Release Management*	3
Number of active users in group *TAC Engineer*	3
Number of active users in group *TAC Manager*	2
Number of active users in group *Tech. Pubs. Manager*	2
Number of active users in group *Technical Writer*	2

User Statistics section

Problem Statistics	
Total number of problems in database	384
Number of problems created to date this month	104
Number of problems created last month (May)	26
Number of problems created in last 30 days	120
Number of updates applied to date this month	506
Number of updates applied last month (May)	150
Number of updates applied in last 30 days	624

Problem Statistics section

File Attachments	
Number of attachments in system	48
Average size of an attachment (kB)	557
Maximum size of an attachment (kB)	10199

File Attachments section

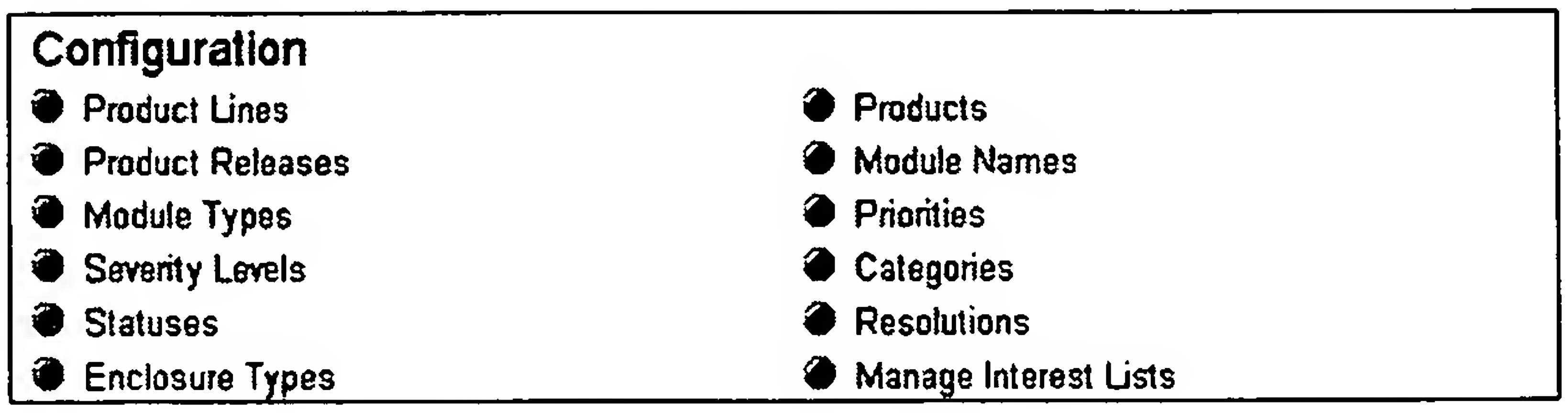
ExtraView Configuration

Configuration items are fields other than UDFs that appear in your installation of ExtraView. The Configuration section of Administration menu will vary

drastically based on different companies' particular implementations.

Altering Configuration Settings

1. From the Administration menu, see the items under Configuration.

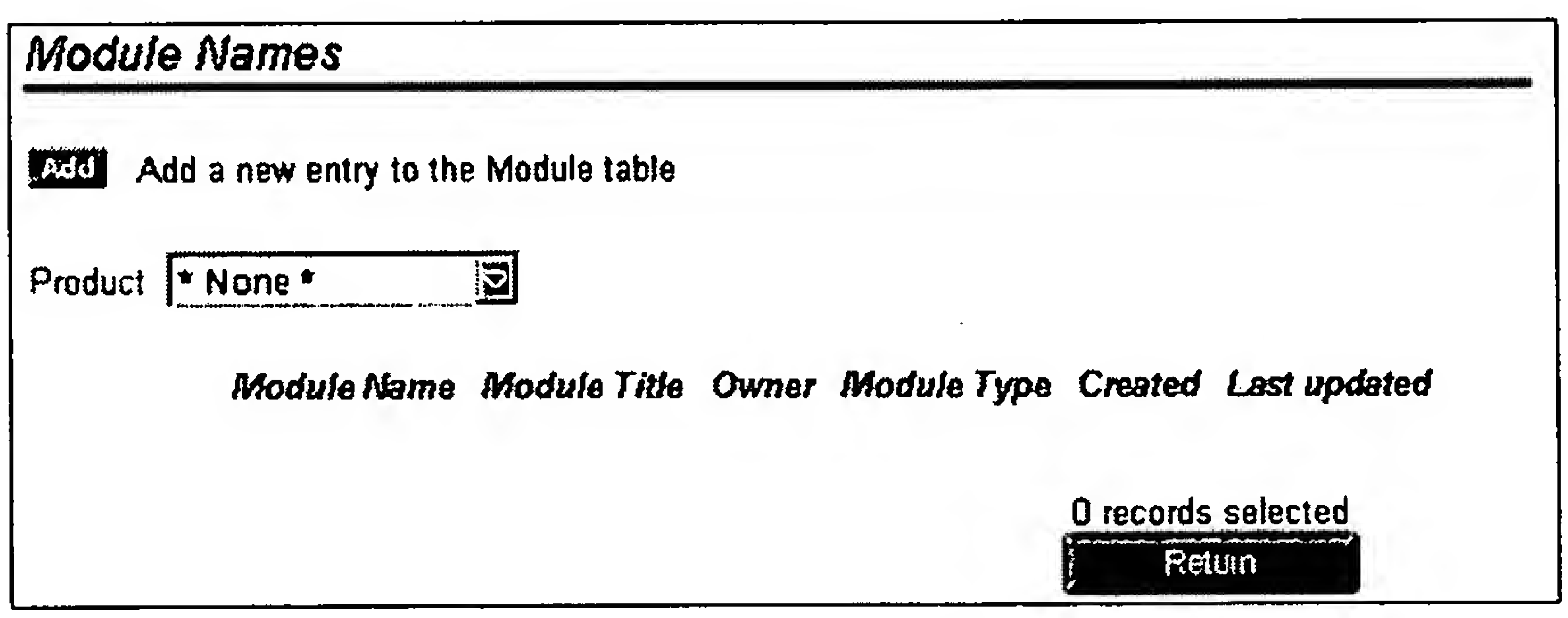


Configuration section

2. For purposes of explanation, we will use Module Names as our example. *Module Names* is a setting that is dependent on other factors (parent-child relationships). For this reason the drop down format is used and the process is slightly different than entering things that are independent.

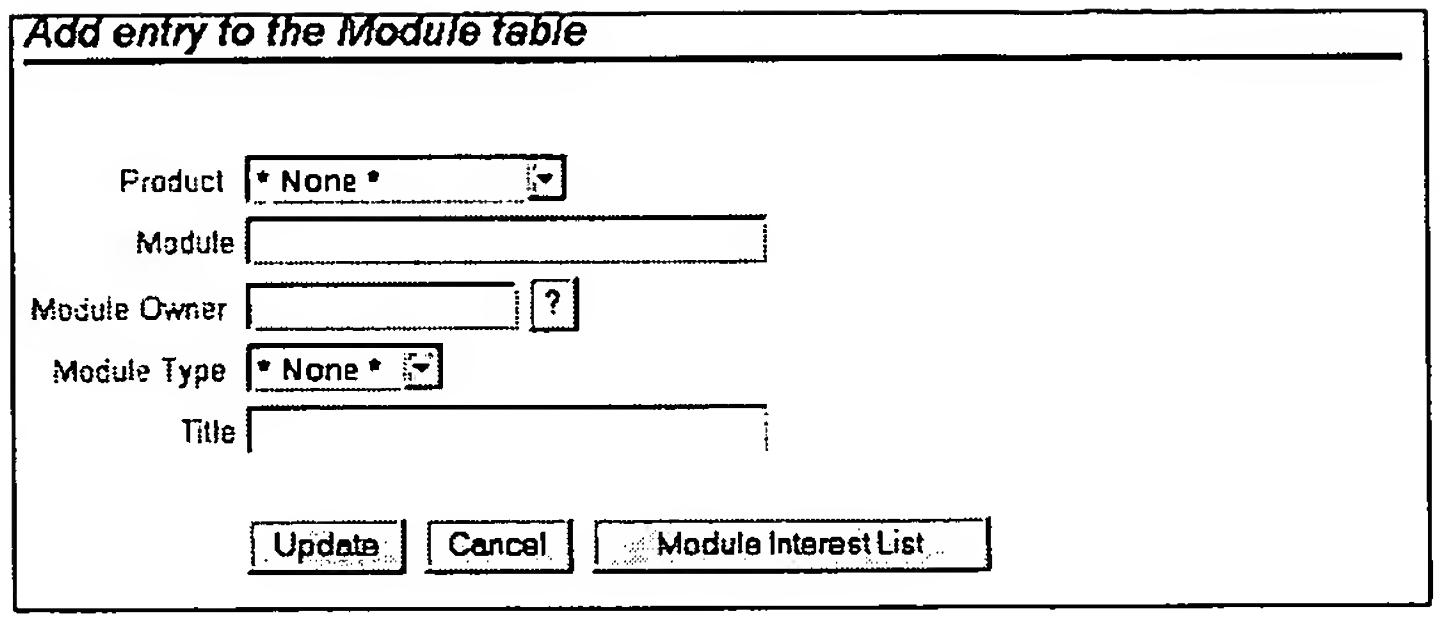
3. To add or modify a *Module*, click **Module Names**.

The following screen appears:



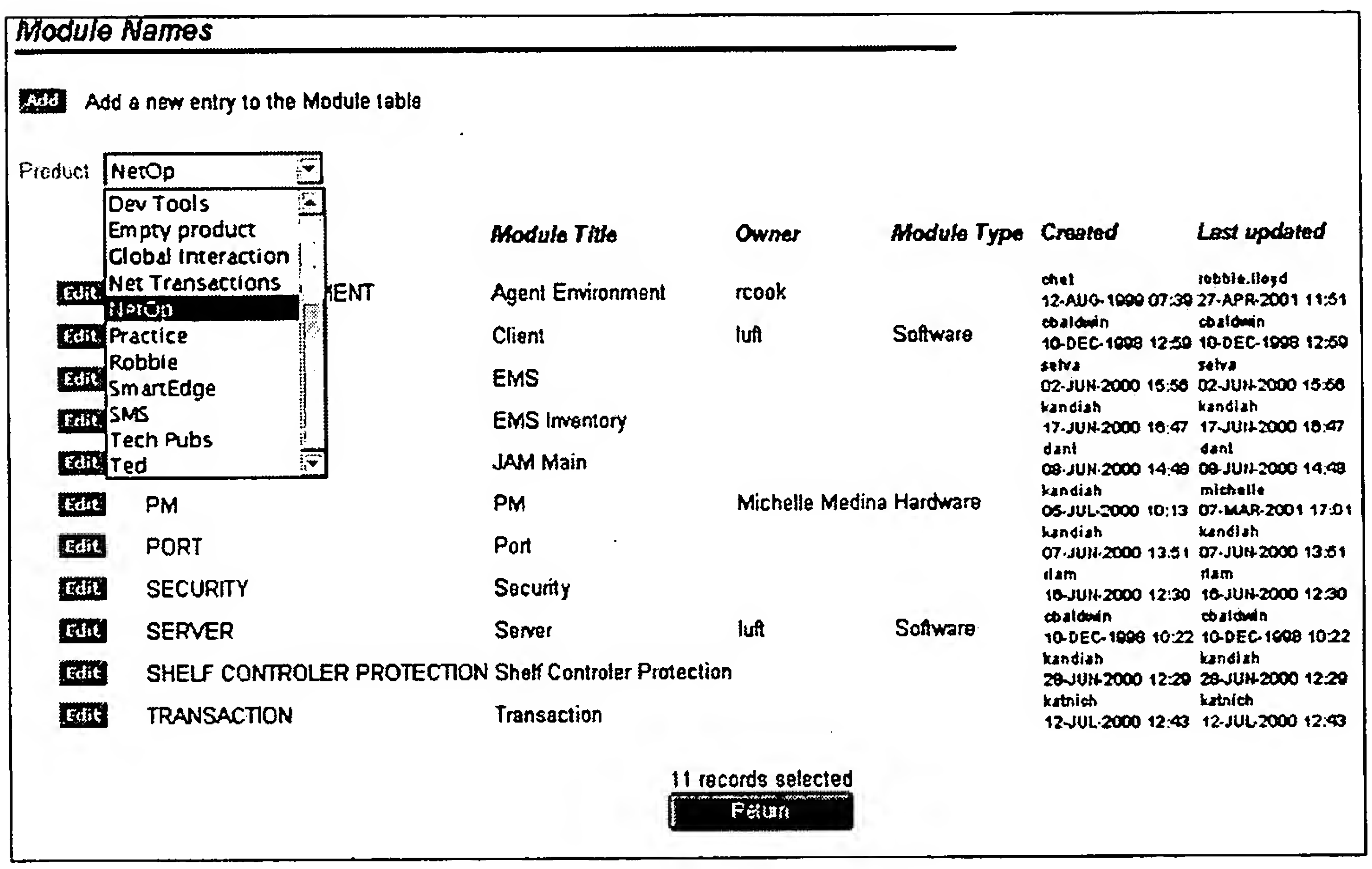
Module Names screen

4. Click the **Add** icon to create a new Module Name. Since *Module* depends on *Product*, you will have to choose an applicable *Product* from the drop-down list to associate with your new *Module*. Fill in the appropriate fields and click the **Update** button.



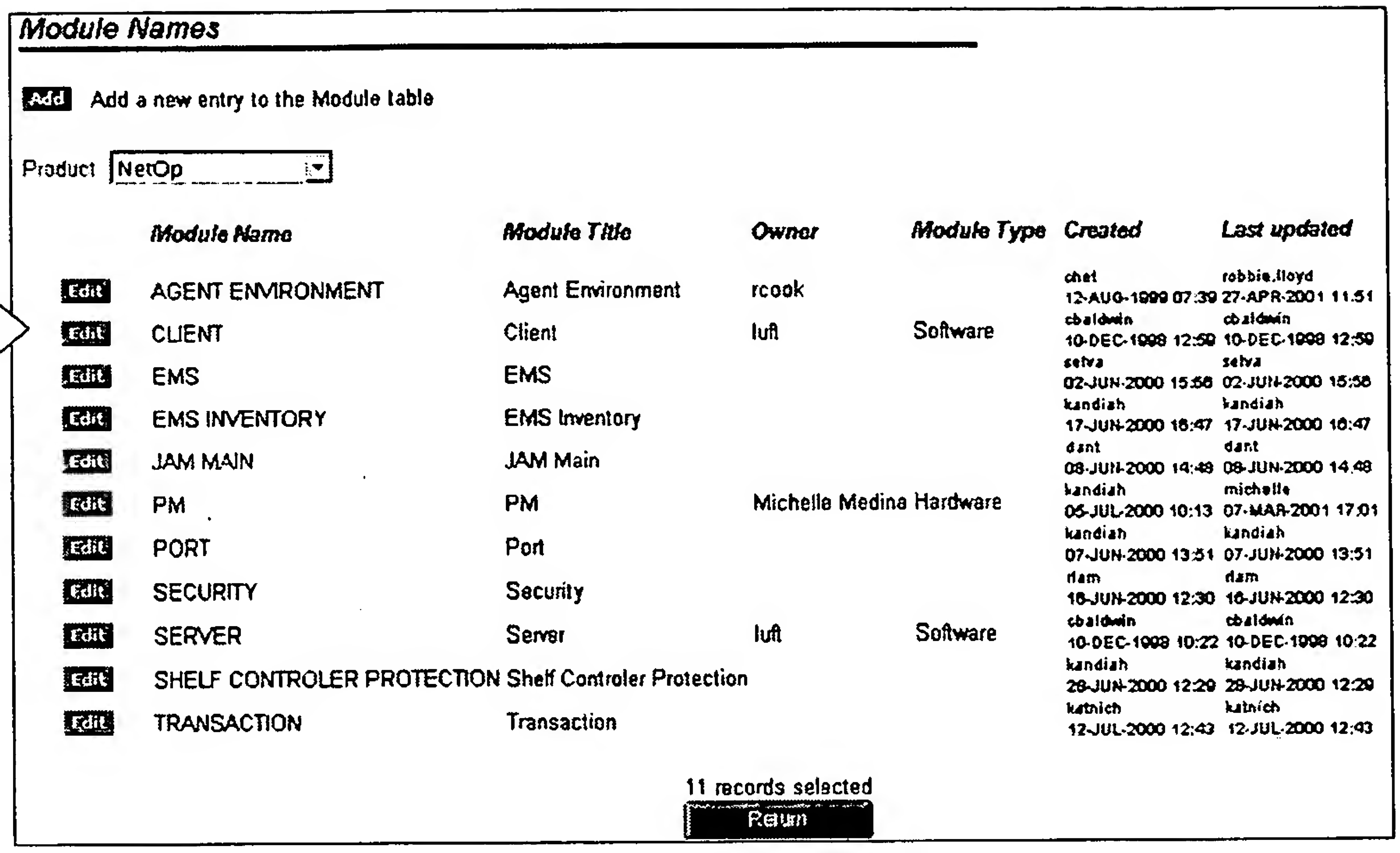
Adding a Module Name

5. To modify an already existing *Module Name*, return to the Administration menu and select *Module Name*, as in step 4. Select the *Product* that pertains to the *Module* you want to edit.



Editing an Existing Module

6. Click the **Edit** button next to the *Module* that you wish to change.



Module Names

Add — Add a new entry to the Module table

Product NetOp

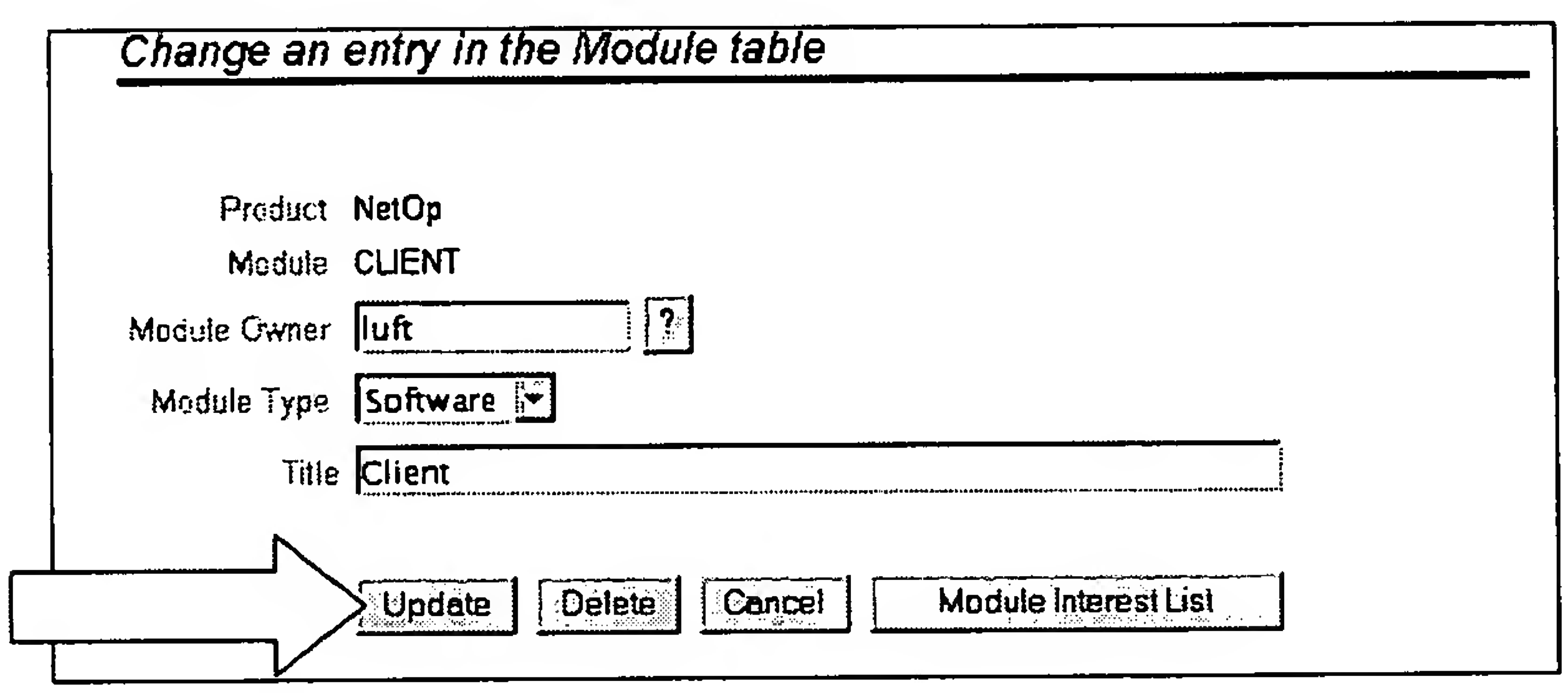
	Module Name	Module Title	Owner	Module Type	Created	Last updated
Edit	AGENT ENVIRONMENT	Agent Environment	rcook		chet 12-AUG-1999 07:39	robbie.lloyd 27-APR-2001 11:51
Edit	CLIENT	Client	luft	Software	cbaldwin 10-DEC-1998 12:59	cbaldwin 10-DEC-1998 12:59
Edit	EMS	EMS			selva 02-JUN-2000 15:56	selva 02-JUN-2000 15:56
Edit	EMS INVENTORY	EMS Inventory			kandiah 17-JUN-2000 16:47	kandiah 17-JUN-2000 16:47
Edit	JAM MAIN	JAM Main			dant 08-JUN-2000 14:48	dant 08-JUN-2000 14:48
Edit	PM	PM	Michelle Medina	Hardware	kandiah 05-JUL-2000 10:13	michelle 07-MAR-2001 17:01
Edit	PORT	Port			kandiah 07-JUN-2000 13:51	kandiah 07-JUN-2000 13:51
Edit	SECURITY	Security			dam 16-JUN-2000 12:30	dam 16-JUN-2000 12:30
Edit	SERVER	Server	luft	Software	cbaldwin 10-DEC-1998 10:22	cbaldwin 10-DEC-1998 10:22
Edit	SHELF CONTROLER PROTECTION	Shelf Controler Protection			kandiah 28-JUN-2000 12:29	kandiah 28-JUN-2000 12:29
Edit	TRANSACTION	Transaction			katnich 12-JUL-2000 12:43	katnich 12-JUL-2000 12:43

11 records selected

Return

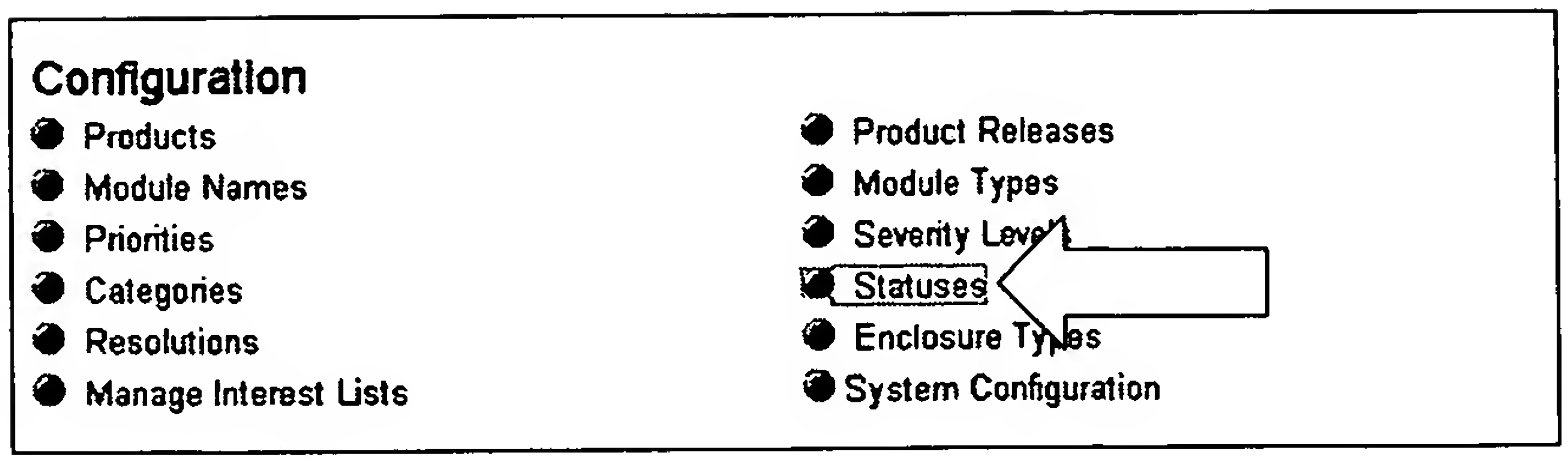
Edit an Existing Module

7. On the following screen, make the desired changes and click the **Update** button.



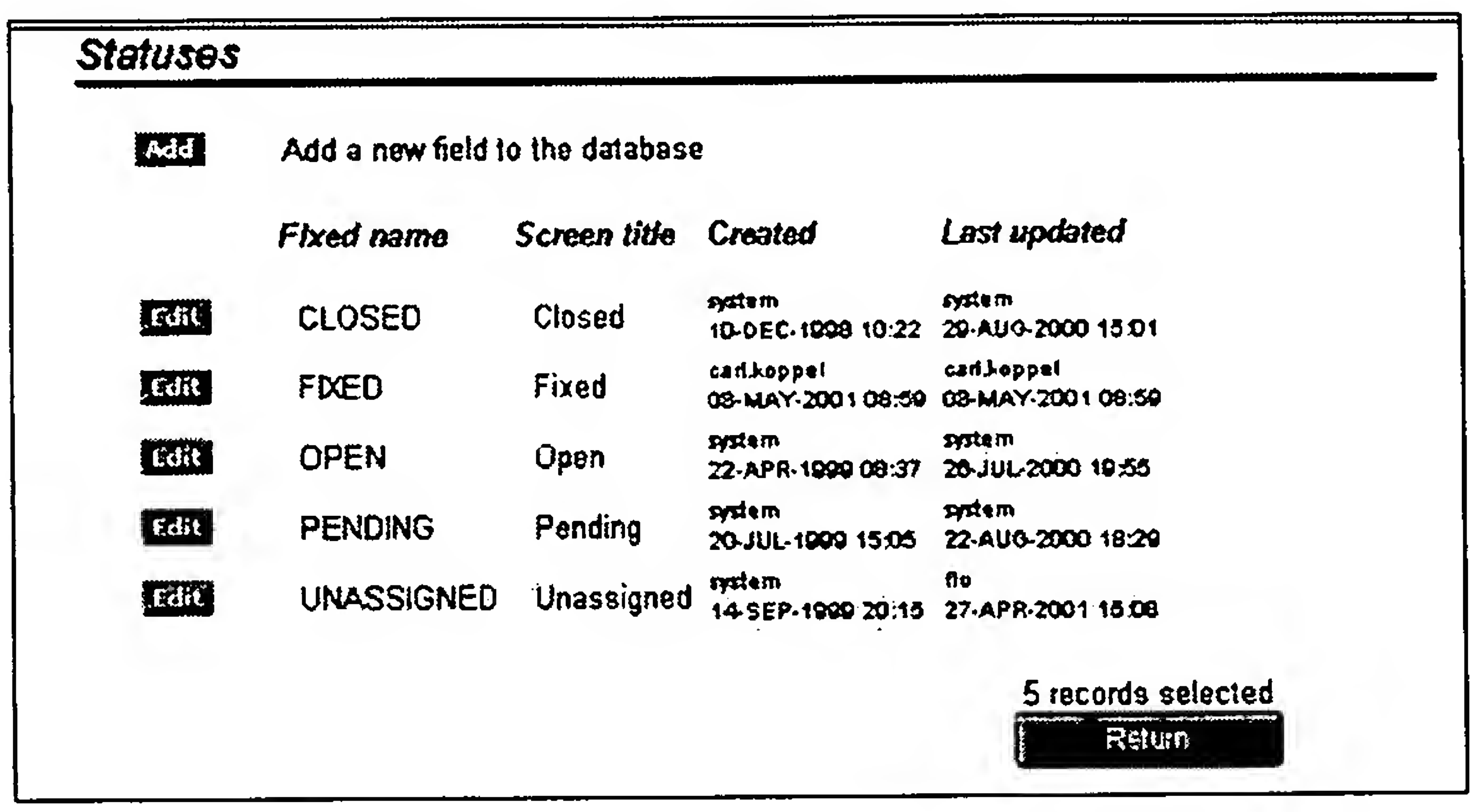
Editing a Module

8. *Statuses* are an example of simple independent lists. To add or modify an independent Configuration Setting, go to the Administration menu, and click the applicable field name in the Configuration section, in this case *Statuses*.



Configuration section

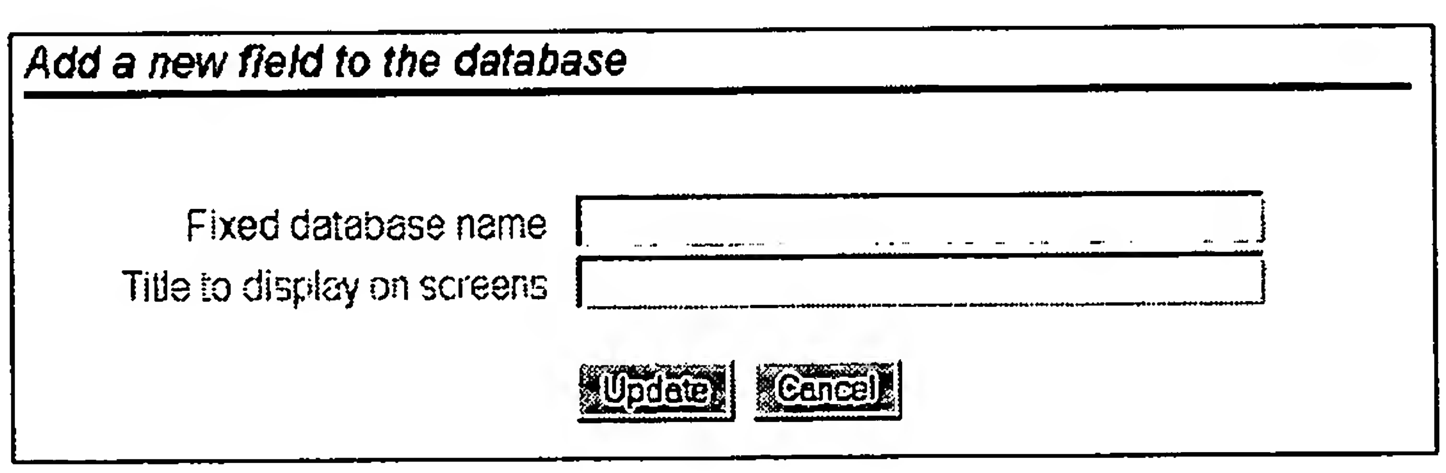
The following Add a new field to the database screen appears:



Statuses screen

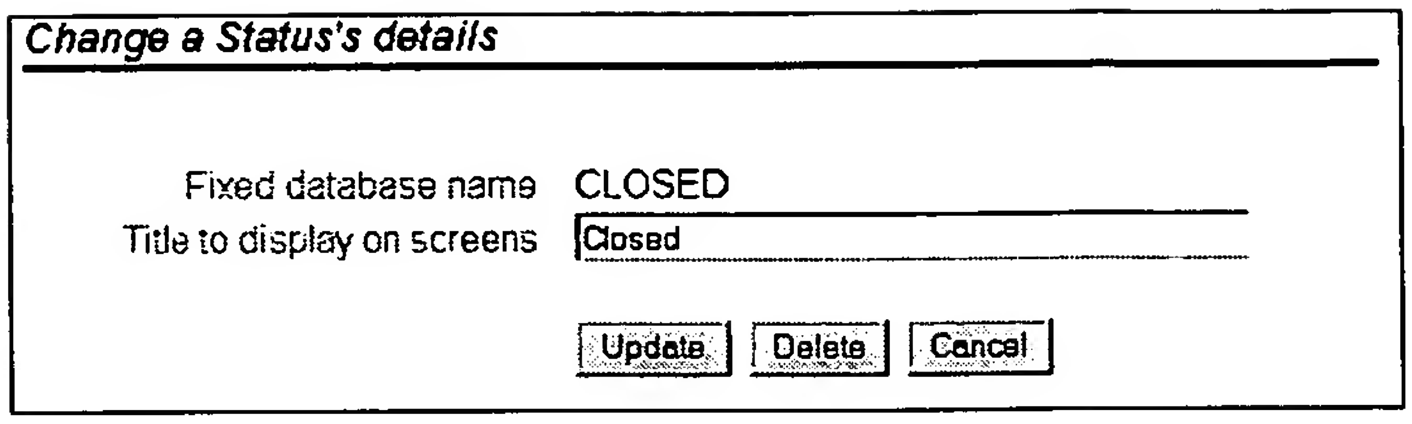
9. To add a new status, click the **Add** icon, and fill in the fixed database name and desired display title.

10. Click the **Update** button.



Adding a New Status

11. To edit an existing status, click the **Edit** icon next to the status name you wish to change. You can either change its screen title or delete it. Click the **Update** button when finished.

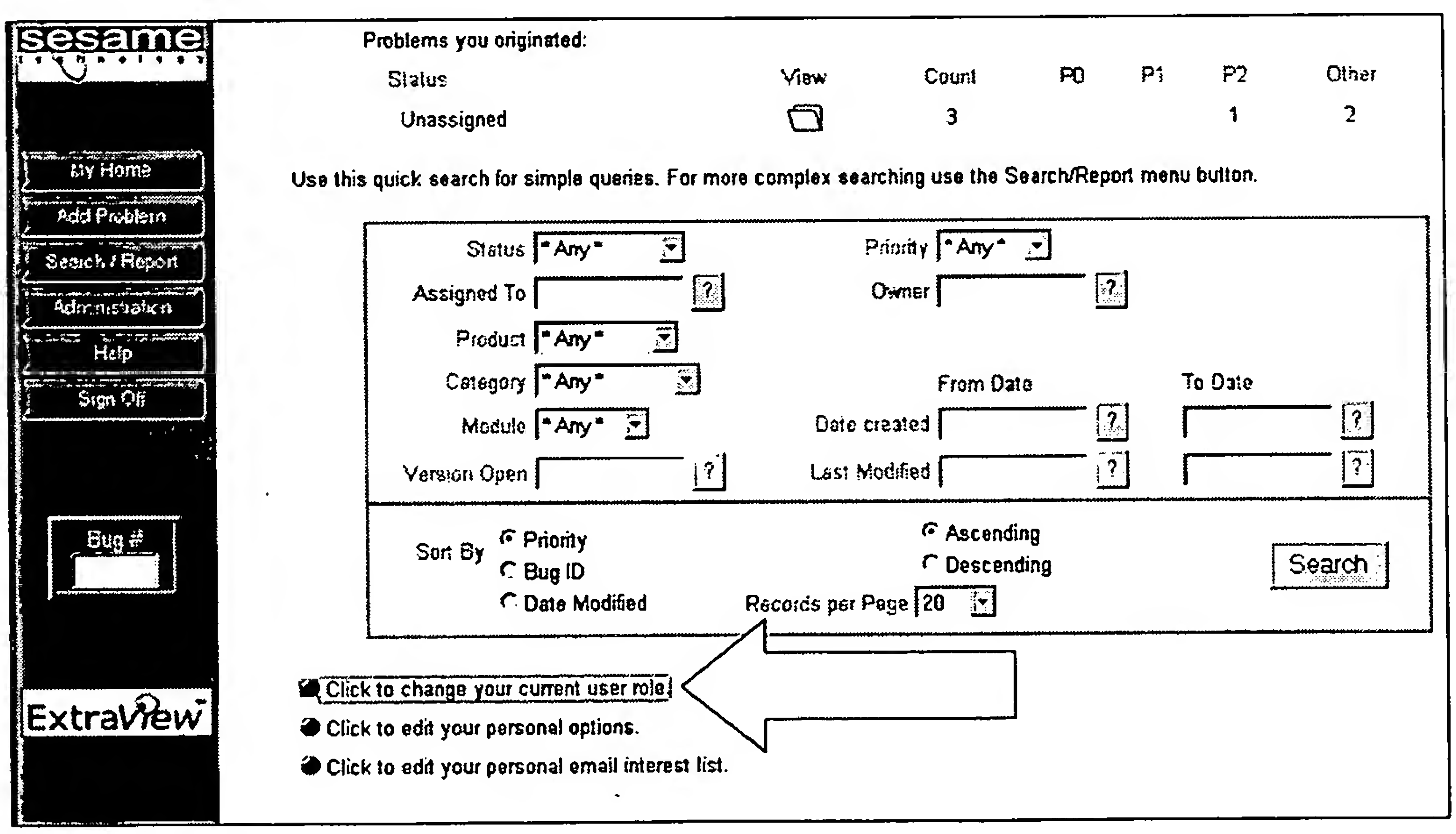


Editing an Existing Status

User Roles

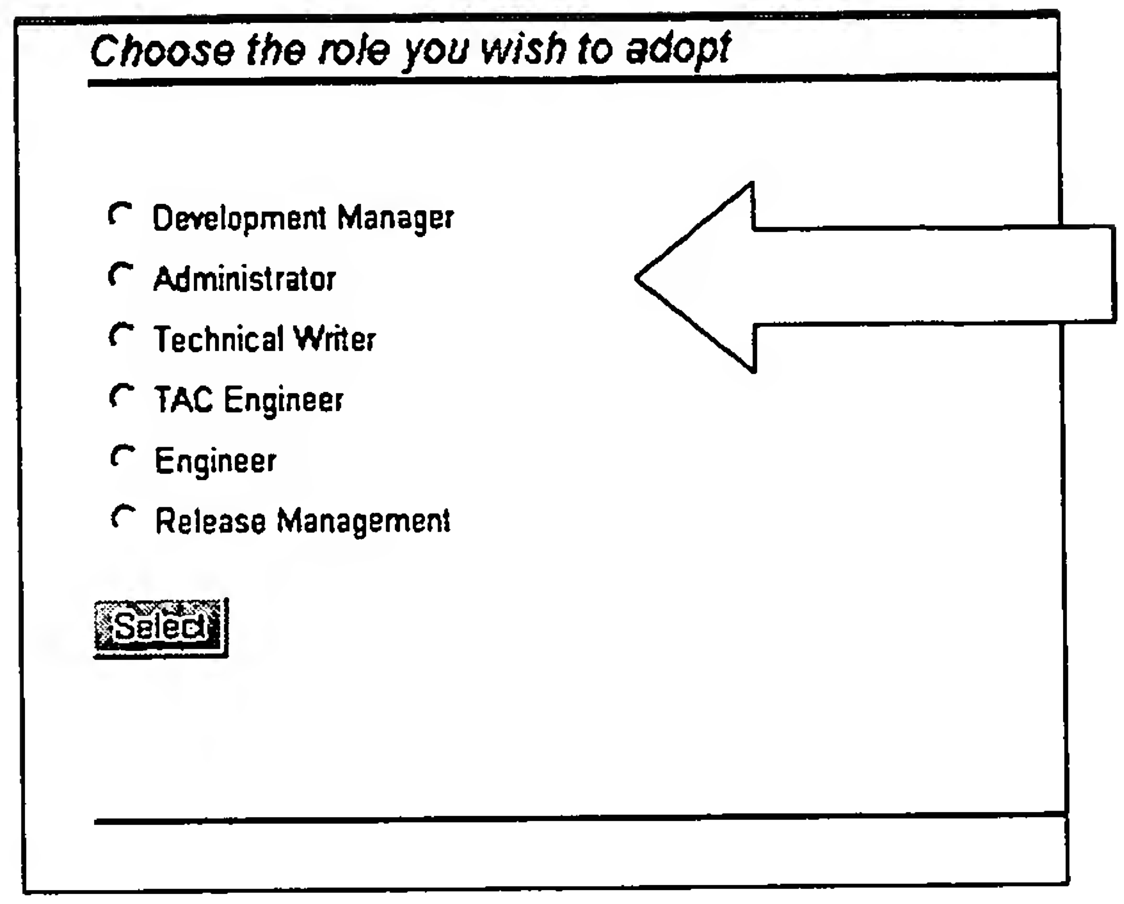
You have the ability to change your role as long as you belong to more than one User Group. This allows you to wear a "different hat". By changing your role you can test the functionality of your implementation and clearly see the permissions of a particular User Group without having to login repeatedly.

In order to change your user role without logging out, just click on **click to change your current user role** located near the bottom of the home page.



Home Page screen

Select the role you would like to play by selecting a radio button from any User Group and then clicking the **select** button. Your role has now been changed and your permissions will reflect the change. You may find that access to certain buttons on the left navigation bar disappears, or that fields no longer show up in the add/edit screens, or that buttons are added and fields appear in some screens; this is a direct result of changing your role.

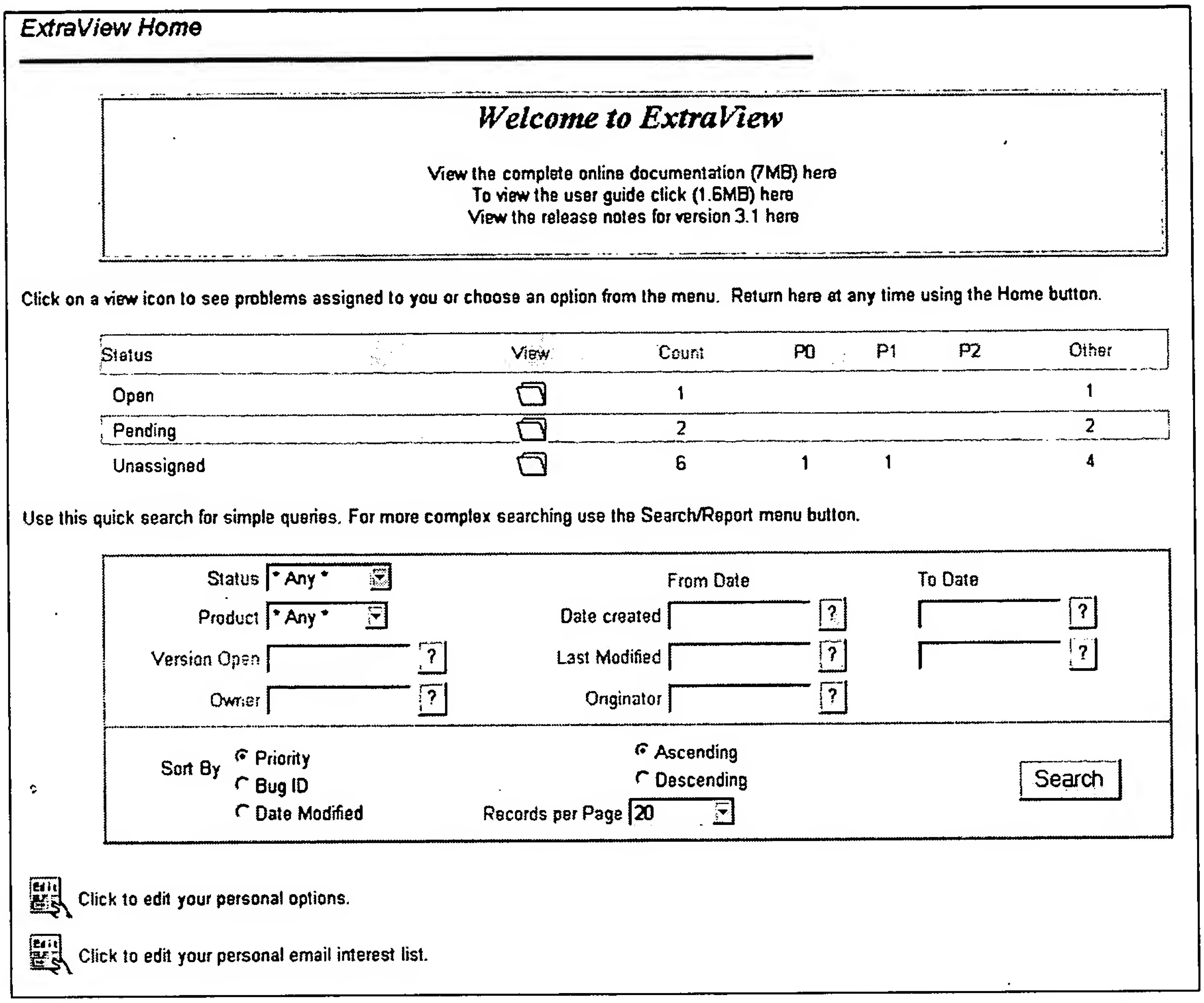


User Role screen

Customized ExtraView Home Screen

Different installations may have different customized Home Pages. The main feature of the Home Page shown is a Data Summary Table:

- Provides a list of the user's currently active problems by product
- Provides a list of the issues that the user created
- Provides the status of all currently active problems by product
- Provides the user a drill-down view of all currently active problems by product
- Provides a count of all currently active problems by product



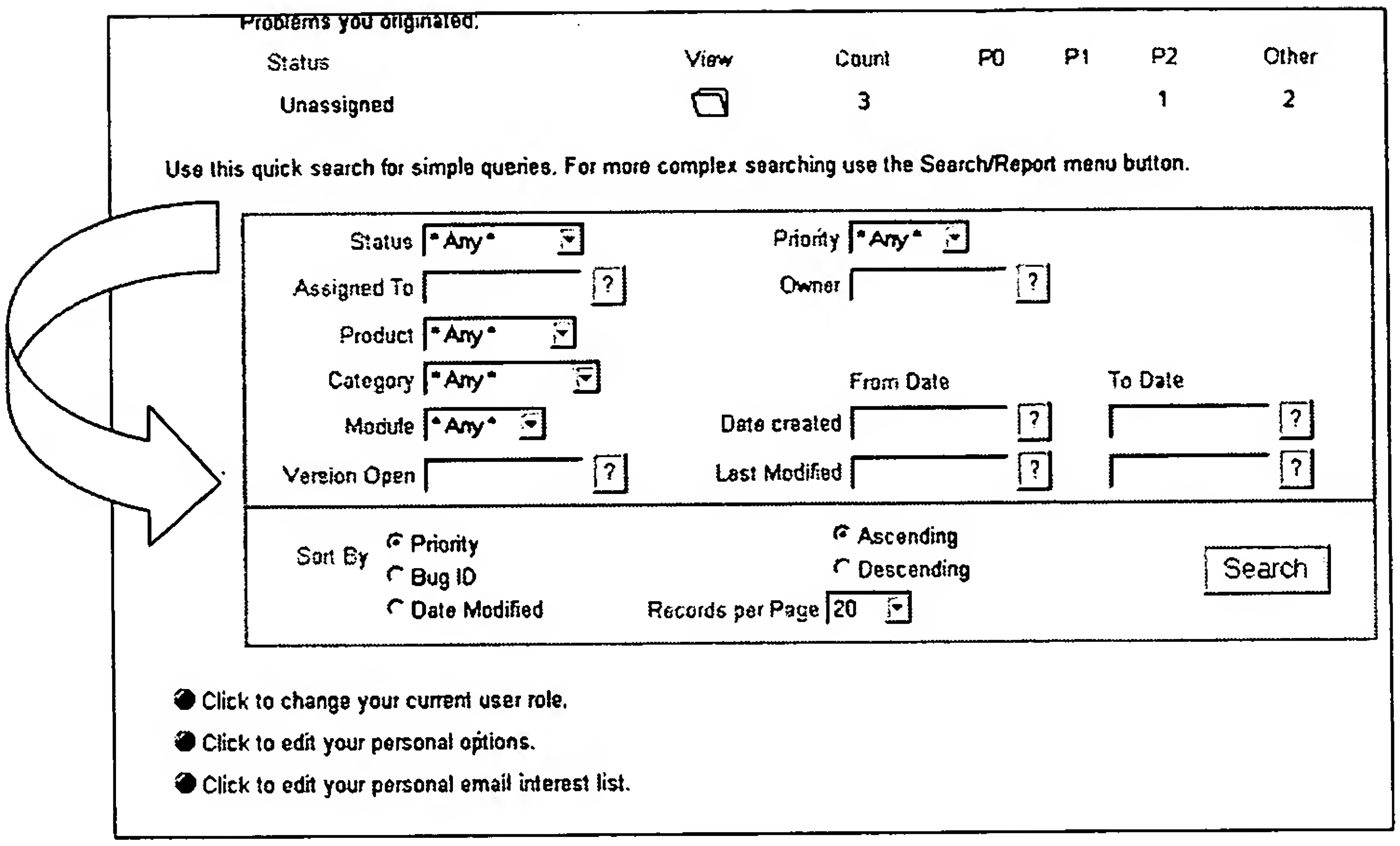
Home Page screen

In addition to the Data Summary Table, the top part of the Home Page has a message field that the system administrator can alter at any time.

Perhaps the most innovative feature of the Home Page is the Quick Search option that is provided. Here you are able to use the majority of the search parameters provided on the Search/Report screen to begin searching. Also note that in Unix, the pick list is not scrollable but static.

If you or your customers are not interested in searching from the Home Screen, you can turn this feature off.

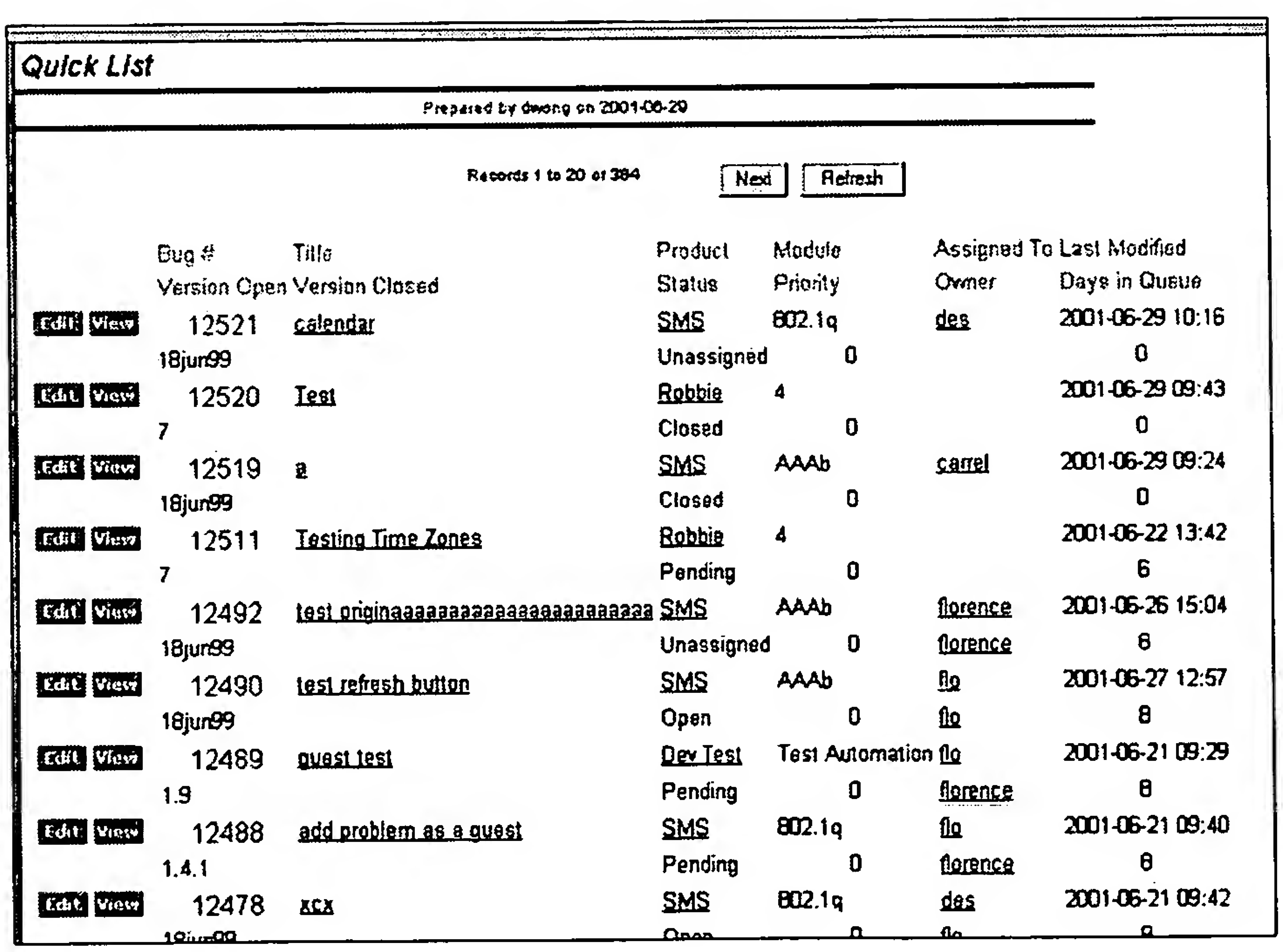
1. From the Administration menu, click on **Default Values and Behavior Settings** and then click **Edit** next to ABBREVIATED_HOME_PAGE. From this screen you are able to enter "yes" or "no" based on your preference.



Home Page screen

To use the search option from the home page:

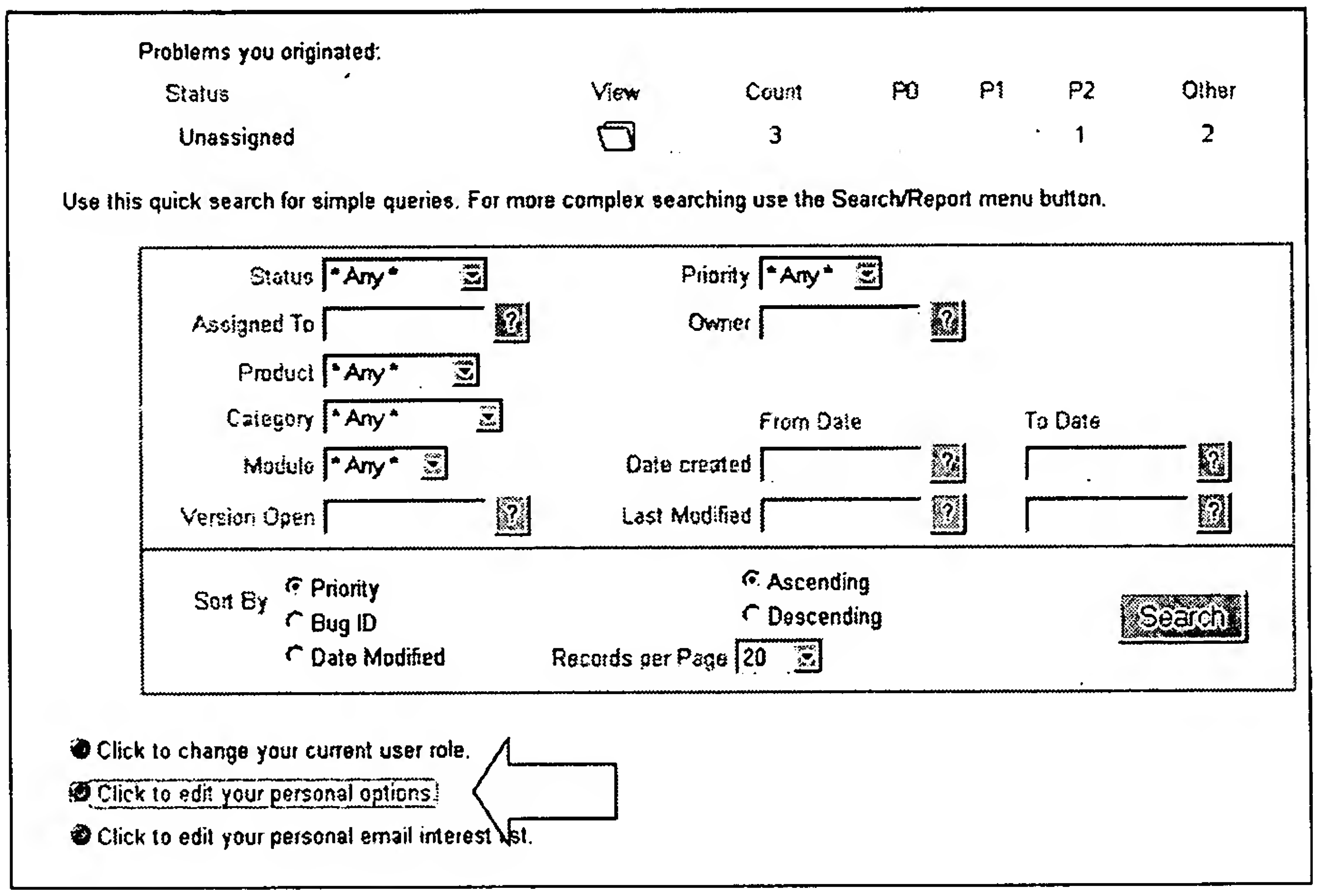
1. Select anything in the fields above to build your query. For example, you can select one option or multiple options from status or from product or both. Then click on the **Search** button and the results are displayed.



Quick List

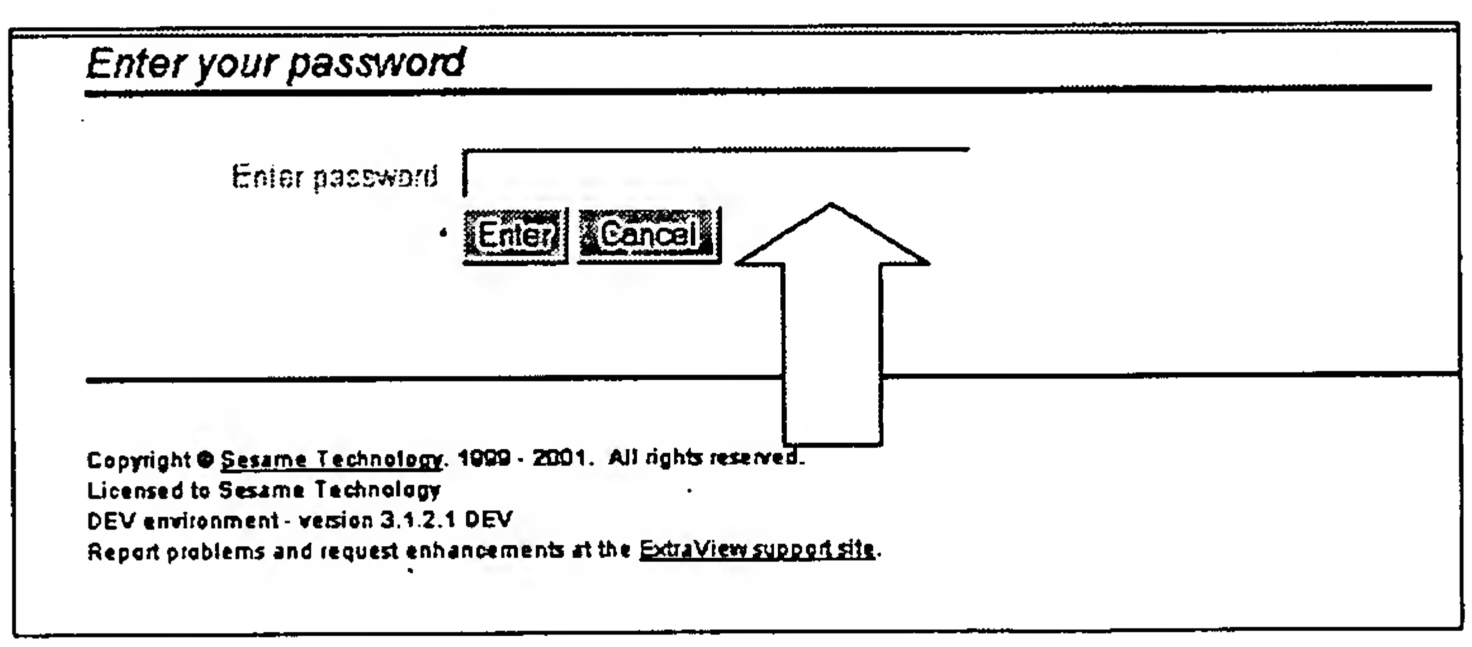
Editing Your Personal Options

Editing personal options allows you control how you want to enter dates into the system, what your password will be, user information that others will see, notification via e-mail, how many records you view per page and what privacy group you belong to.

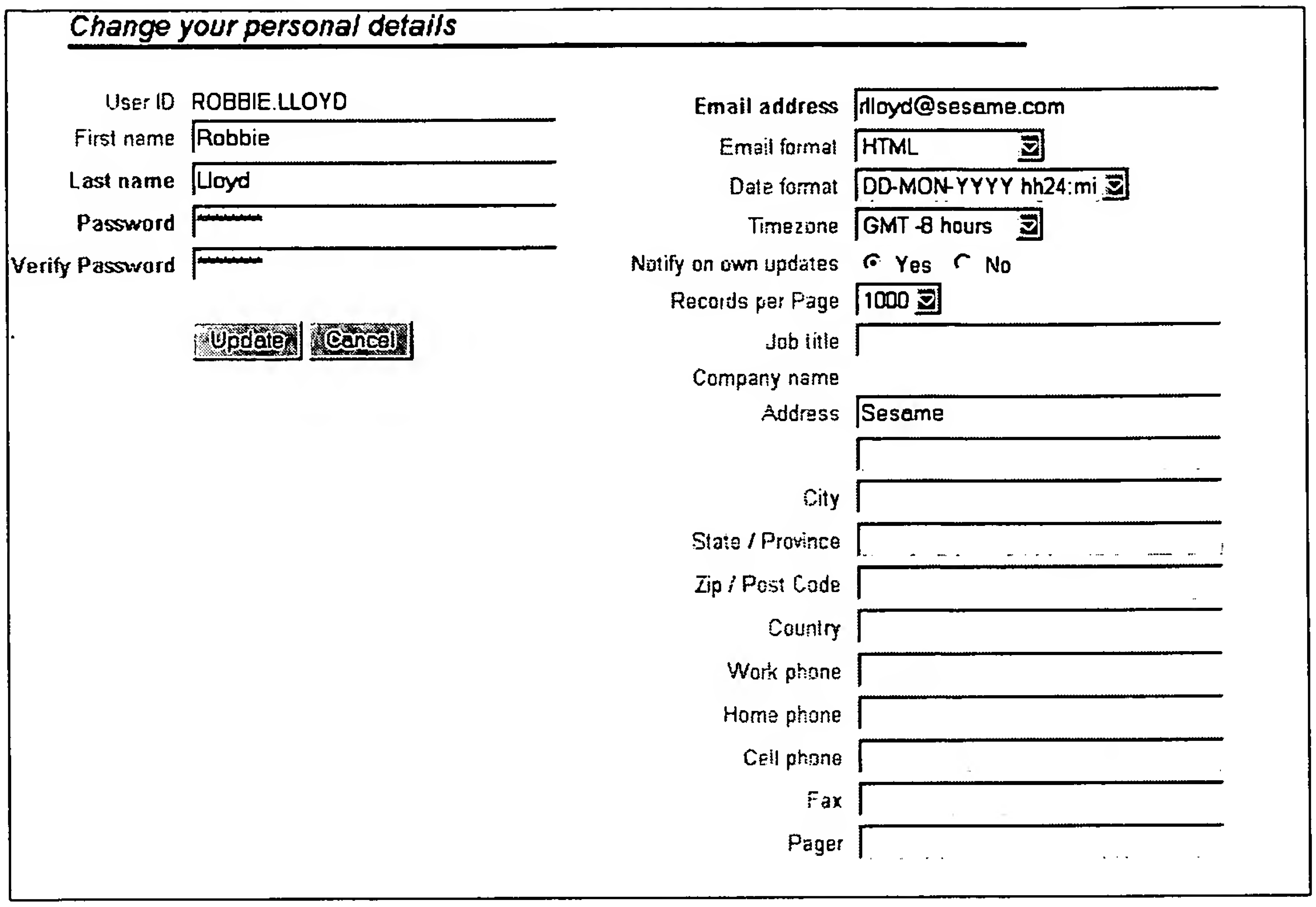


Home Page screen

Prior to entering this screen you will be asked to enter your password.



Secondary Level Password screen



Change Personal Details screen

MANAGE USERS & SECURITY

ExtraView allows the System Administrator to create an unlimited number of user groups and users, and to define, and then apply security or access privileges to users based on these groups. These access privileges are applied to each and every field, to each and every menu button, and various other features within ExtraView, allowing you to control access to nearly every feature of the product.

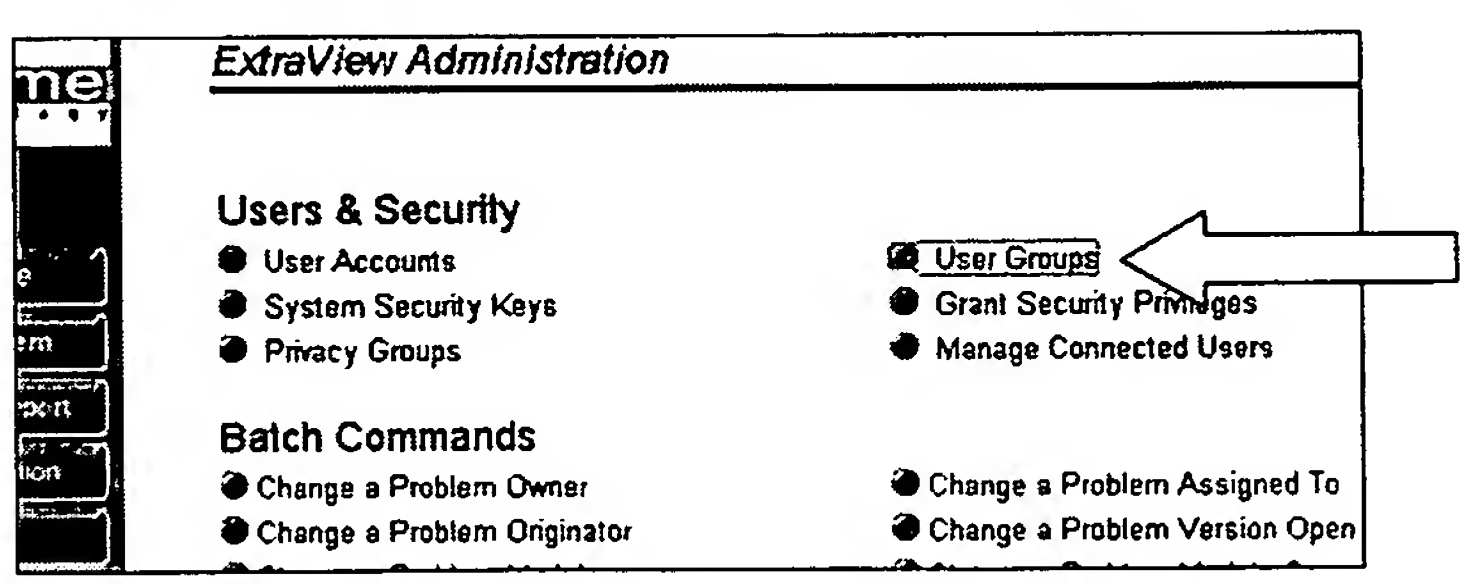
User Groups

User Groups are the functional teams of your company or the external users that will be using ExtraView. User Groups are assigned specific privileges based on what you want each of them to be able to see and do. Sesame Technology will generally provide the initial User Groups setup for you at the time of license. These initial groups may or may not include the following:

- Administrator
- Customer
- Engineer
- QA

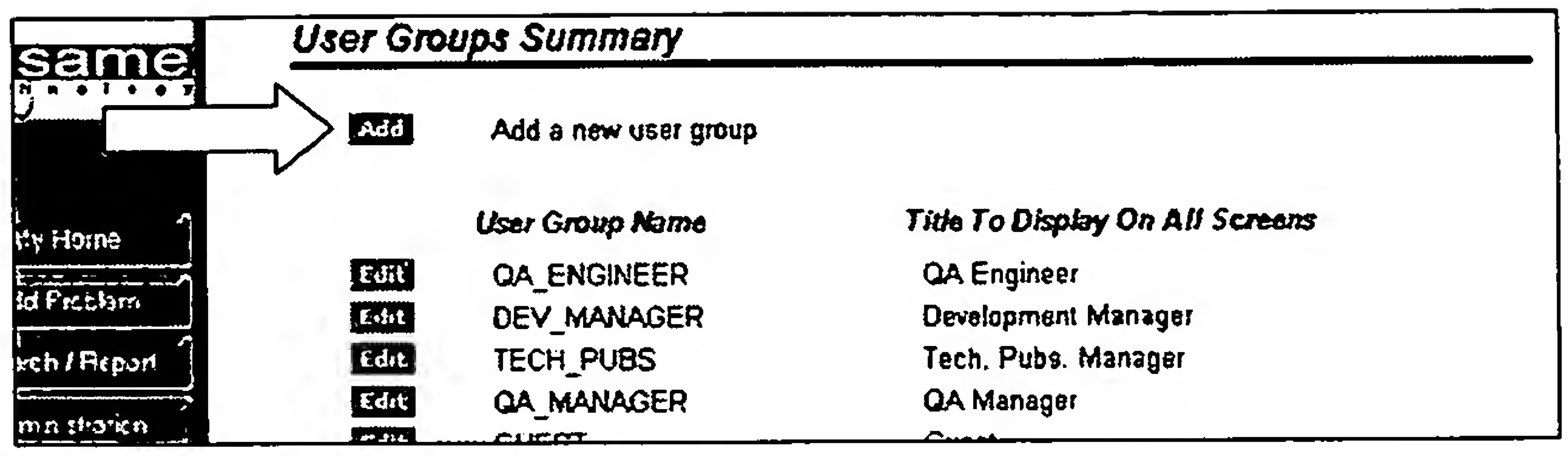
Add User Groups

1. Click **User Groups** under Users & Security on the Administration menu.



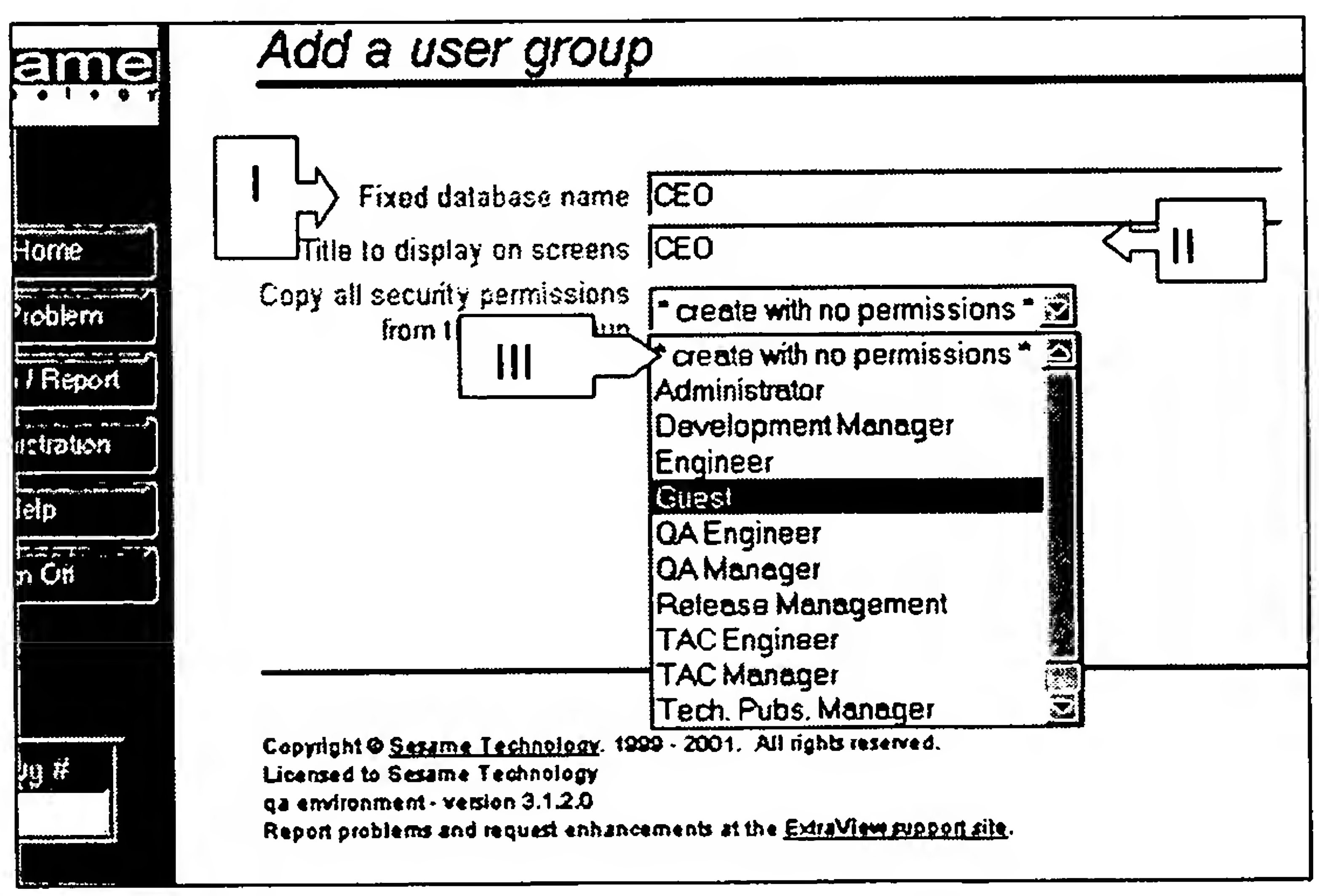
Administration screen

2. Click the **Add** button on the User Groups Summary screen.



User Groups Summary screen

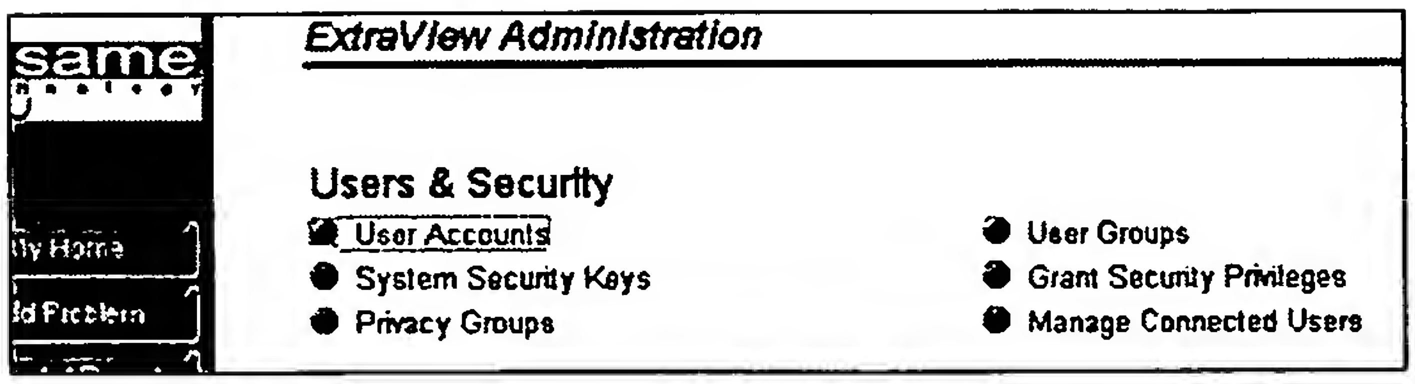
3. Type in a database name, and make it relevant to the name you will use as a title (I). Valid Database names have no spaces, and are composed of letters, numbers, and the characters, -, _, and '+.
4. Type in a title (II).
5. You can then choose to clone the Security Privileges from another existing group, or set your own from Grant Security Privileges by first selecting the *create with no permissions* option (III). Cloning a group is particularly useful when you want to create a new group similar to an existing one. After cloning the privileges, you can make any changes to the new group from the Grant Security Privileges screen.



Add a User Group screen

Add New Users

1. Click **User Accounts** from the Administration menu.

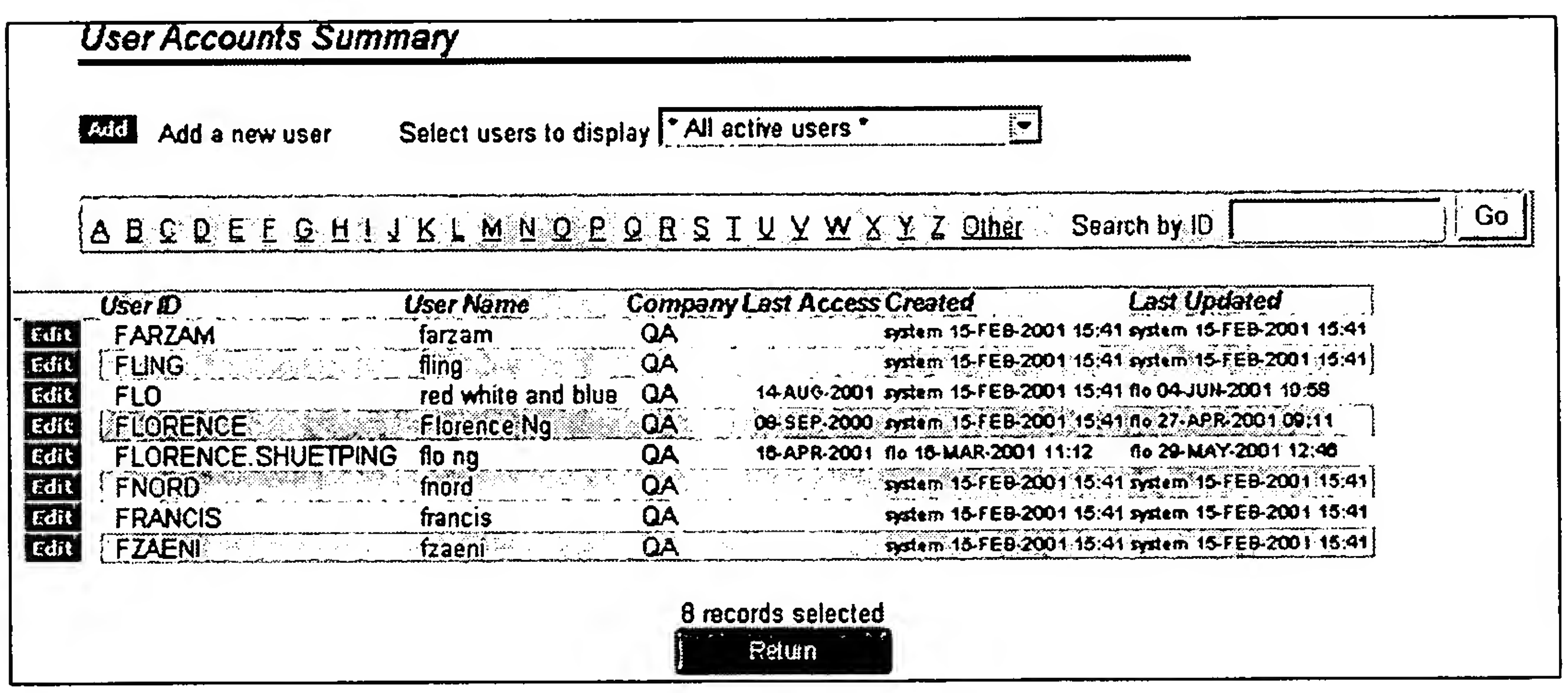


Administration screen

The User Accounts Summary screen appears.

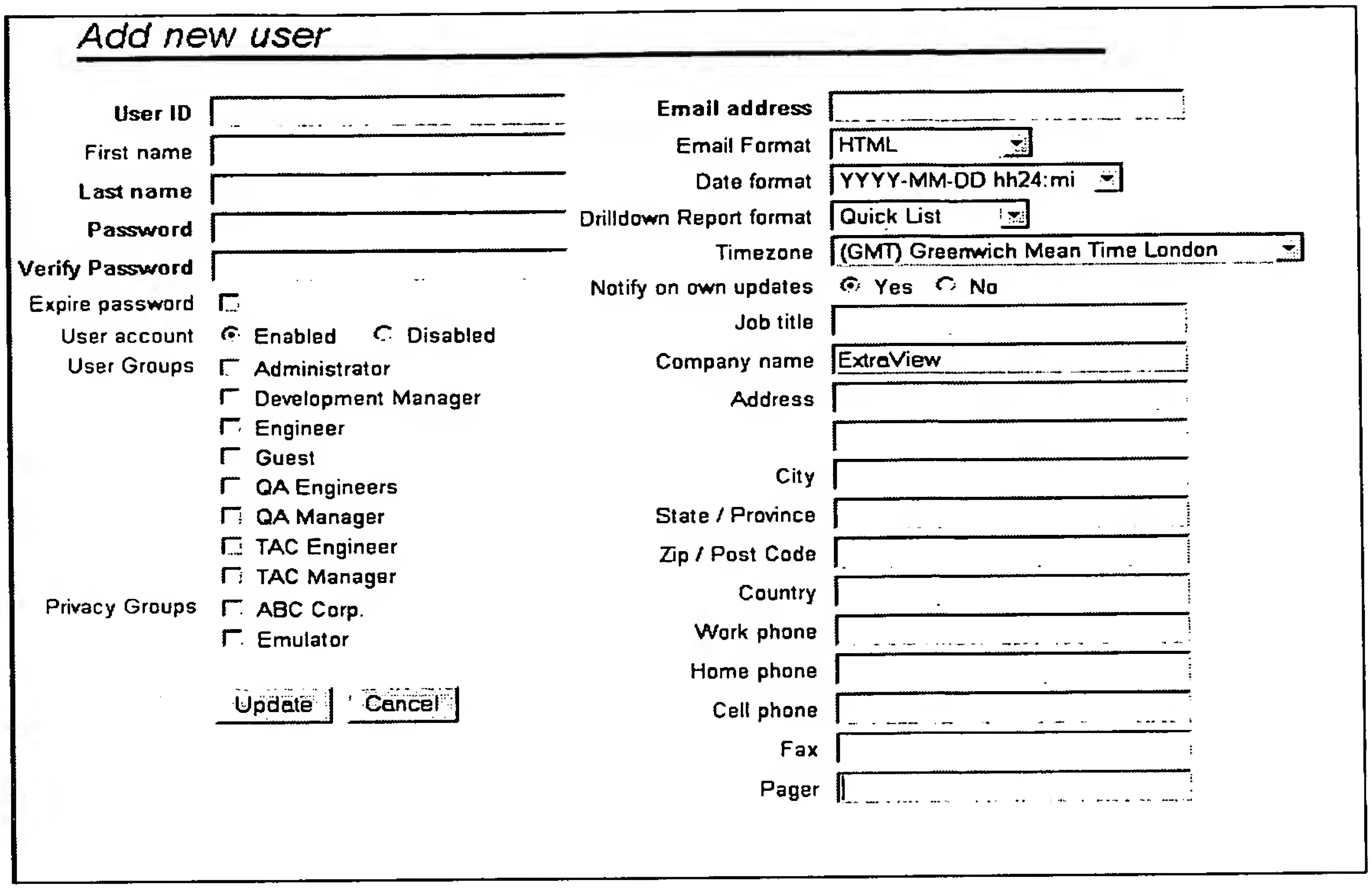
At the top of the User Accounts Summary screen there is the increased functionality to narrow the list of users returned.

- To return inactive users, all users or users belonging to a particular user groups select the appropriate option from the **Select users to display** dropdown
- To return all users with a User ID beginning with a particular letter just click on the appropriate letter. The example below indicates that the letter *F* was selected.
- To search for one particular user, you can type the User ID in the **Search by ID** field and you can press the **Go** button.
- If you would like the entire list to be displayed just change the **Default Value and Behavior Setting** called USER_LIST_SIZE. This field holds the value for the number of users in a selection list before it is broken down and grouped by letter, user group or name.



User Accounts Summary screen

2. Click the **Add New User** icon. The Add New User screen appears.



Add New User screen

Enter New User Information:

User ID	The name that the new user will use to login to the system (required)
First Name	User's first name (required)
Last Name	User's last name (required)
Password	User's password (required)
Verify Password	Retype User's password (required)
User Account	Enabled User may login Disabled User may not login
User Groups	A functional team where members have the same set of privileges
Privacy Groups	Privacy Groups enable certain groups within ExtraView to view different specific sets of issues without making the issue PUBLIC (all users can see it) or PRIVATE (only internal users can see it)
Email Address	The email address to which automatic email notification will be sent
Email Format	HTML, Plain Text (brief), or Plain Text (full). The brief option provides just a few fields, enough to recognize the issue
Date Format	Date format selection applies for the new user system-wide
Time Zone	Time-zone selection applies for the user system-wide
Notify on own updates	Enabled will receive automatic email Disabled will not receive automatic email
Company Name	For internal users, this should reflect the same value as COMPANY_NAME in installation setup
User Profile Fields	Enter the appropriate user profile and contact information

3. After you have finished entering the information, click the **Update** button, and you will be returned to the User Accounts screen, where you can add another user or return to the Administration menu.

Note: If the application default named ENFORCE_DETAILED_USER_INFO is set to "Yes", then additional fields will become required. This is used when you want users that self-register on the system to provide a significant level of personal details.

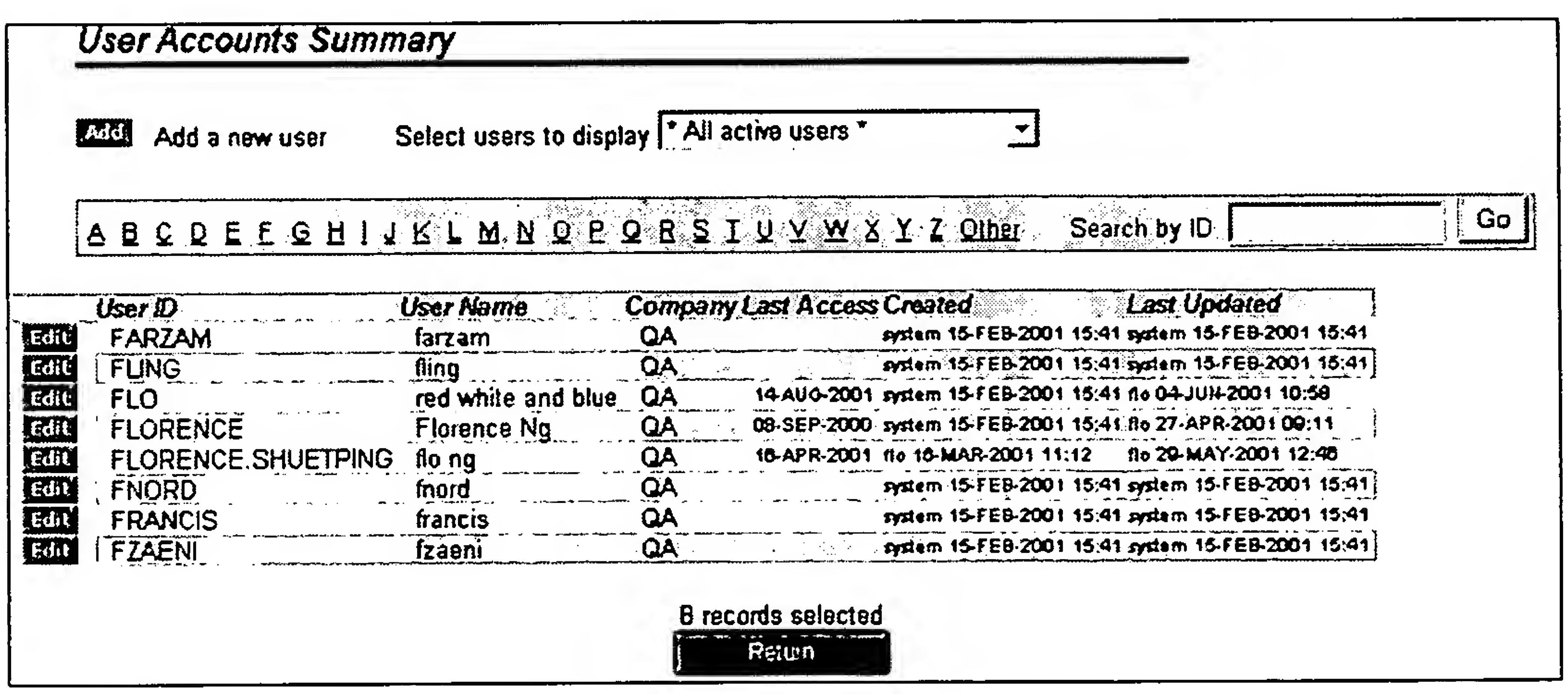
Edit User Accounts

1. To edit user accounts, click on **User Accounts** from the Administration menu and the User Accounts Summary screen will appear.

At the top of the User Accounts Summary screen there is the increased functionality to narrow the list of users returned.

- To return inactive users, all users or users belonging to a particular user groups select the appropriate option from the **Select users to display** dropdown.
- To return all users with a User ID beginning with a particular letter just click on the appropriate letter. The example below indicates that the letter *F* was selected.
- To search for one particular user, you can type the User ID in the **Search by ID** field and you can press the **Go** button.

Note: The above functionality can be utilized when Editing or Deleting a User Account.

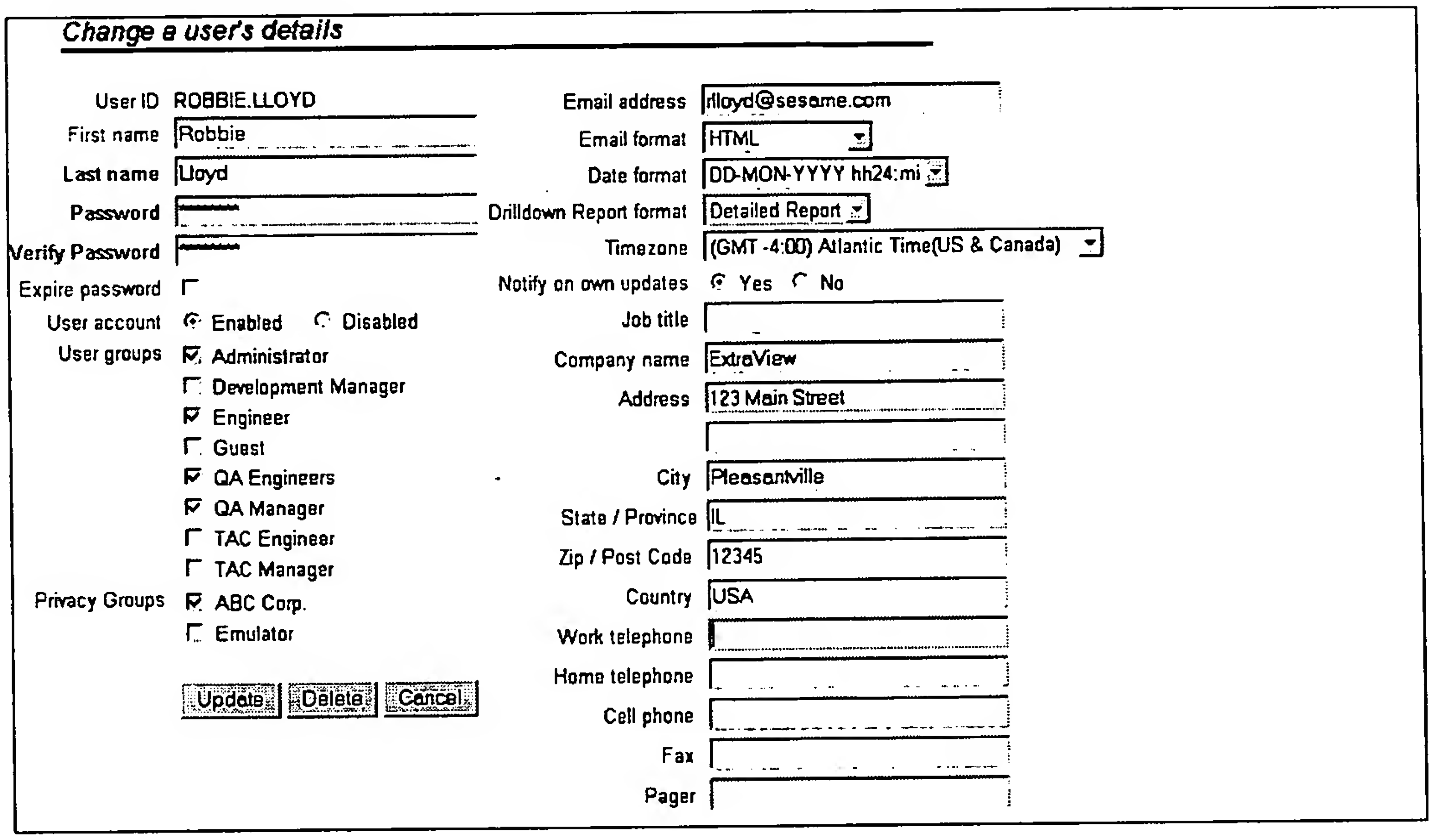


User Accounts Summary Screen

2. Click the **Edit** button beside the user account you wish to edit.

The user information screen then appears.

3. When you are done changing the desired information, click **Update**.



Change User Details

Delete User Accounts

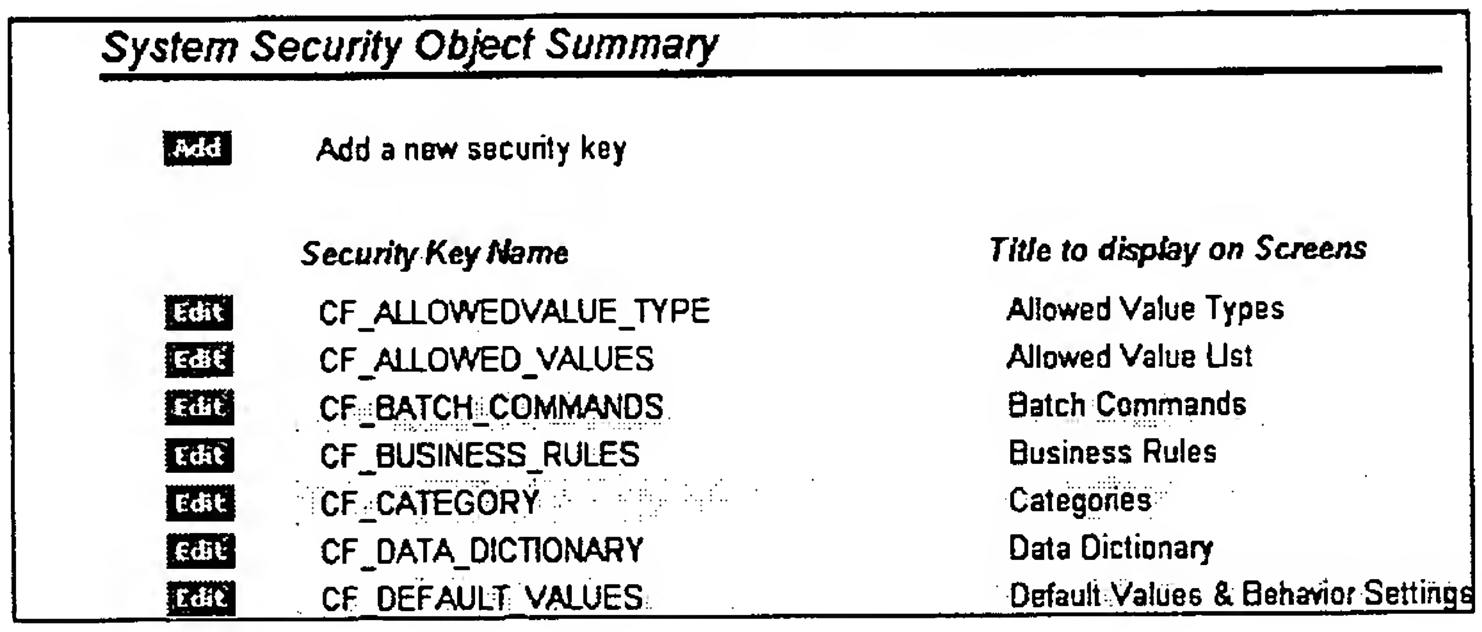
1. To delete user accounts, click on User Accounts from the Administration menu, and then click the edit button beside the user account you wish to delete. The user information screen then appears.

2. To disable a user's login access, click the **Disable** User Account radio button, and then click **Update**.

3. To completely remove a user from the system, click the **Delete** button, and then click **Update**. Note that a user can only be removed if he or she no longer has any issues associated with their User ID. You may wish to make the user inactive if he or she is no longer authorized to use ExtraView, but still has issues in the system.

System Security Keys

Each field, button and feature within ExtraView is controlled by what is known as a System Security Key. From the Grant Security Privileges section you are able to manipulate the Read and Write privileges for these keys to allow or restrict access to these fields, buttons, and features.



System Security Object Summary

Add | Add a new security key

	Security Key Name	Title to display on Screens
Edit	CF_ALLOWEDVALUE_TYPE	Allowed Value Types
Edit	CF_ALLOWED_VALUES	Allowed Value List
Edit	CF_BATCH_COMMANDS	Batch Commands
Edit	CF_BUSINESS_RULES	Business Rules
Edit	CF_CATEGORY	Categories
Edit	CF_DATA_DICTIONARY	Data Dictionary
Edit	CF_DEFAULT_VALUES	Default Values & Behavior Settings

System Security Keys Summary

Edit an Existing Security Key

1. Click on the **System Security Key** option on the ExtraView Administration menu.

2. Click on **Edit** and change the description or title as needed.

Add a New Security Key

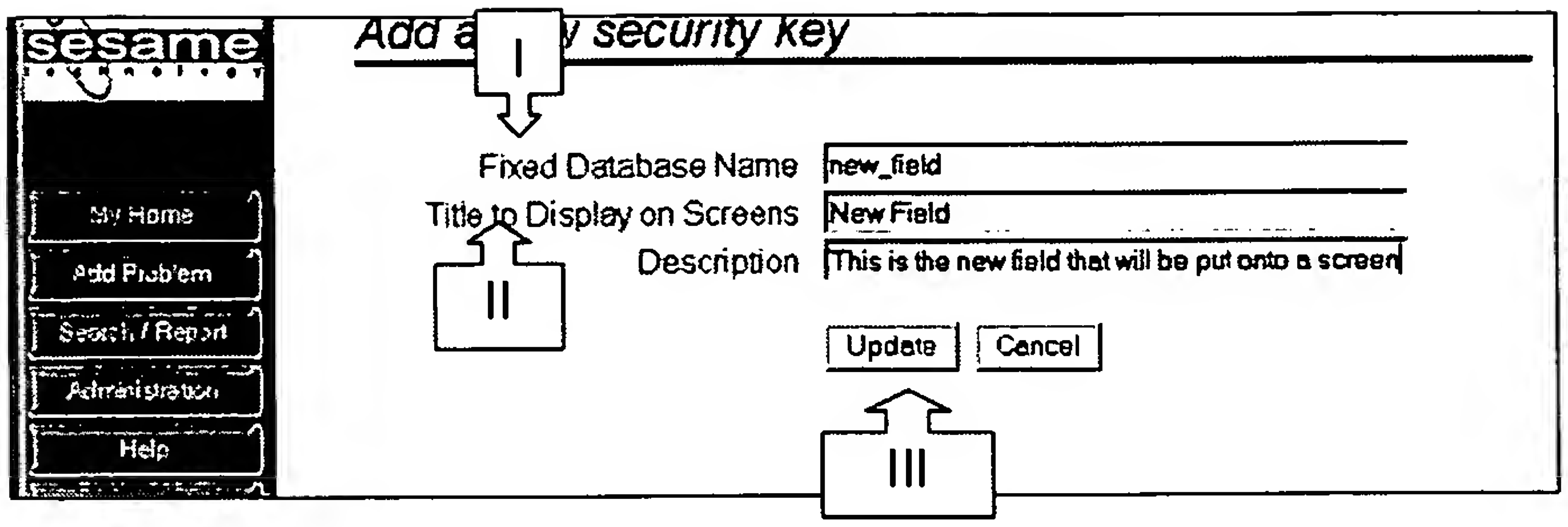
1. To make a new key, click on **Add a New Security Key.**

Note: This should rarely, if ever, need to be done, as new security keys are added automatically when you create new fields within ExtraView.

2. Enter a name and a key is created (I). Database names have no spaces, and are composed of letters, numbers, and the characters -, _, and +.

3. Title the new key as you wish (II)

4. Click the **Update** button (III).



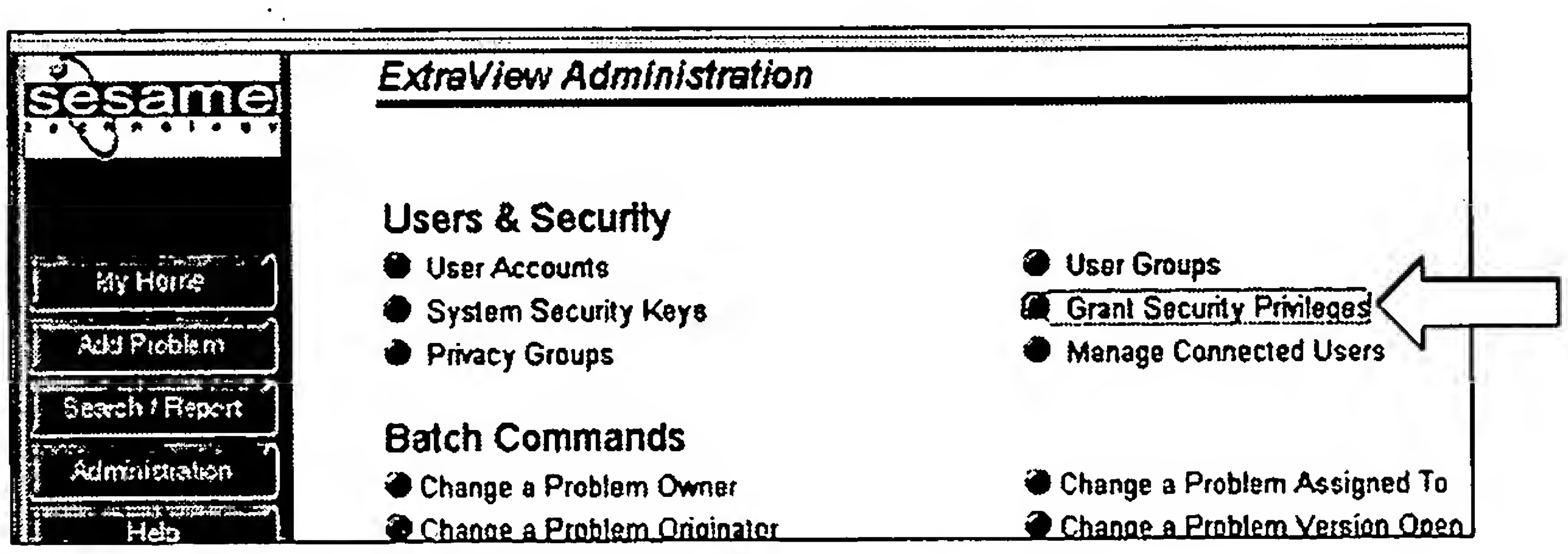
Add a New Security Key screen

Grant Security Permissions

Granting Security Permissions controls group member's access to all fields, buttons and features in ExtraView. In setting permissions, the System Administrator has the ability to make these kinds of items read only, write only, both readable and writable, or else invisible.

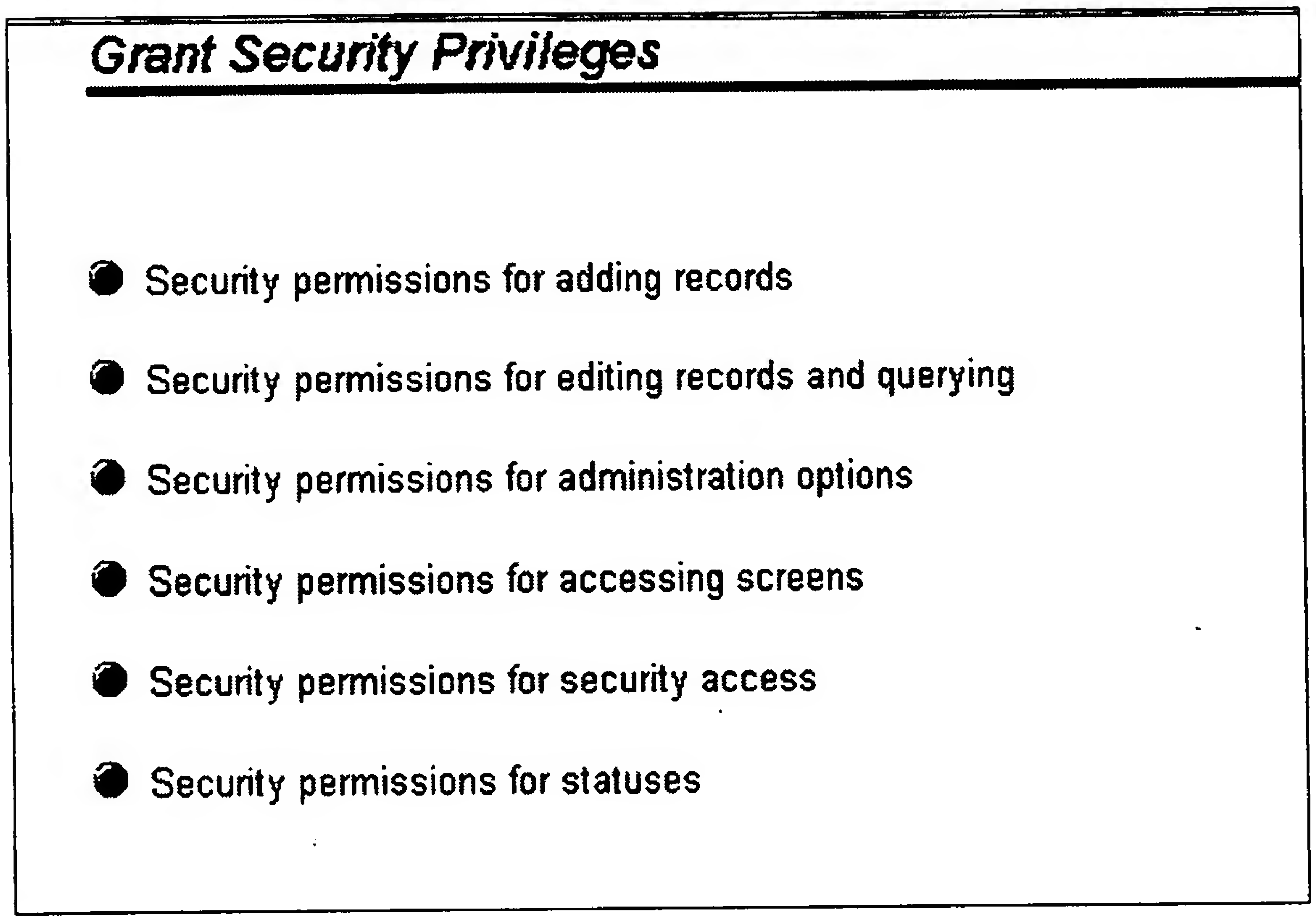
Edit Security Privileges

1. Click **Grant Security Privileges** from the Administration menu.



Administration screen

The Grant Security Privileges screen appears.

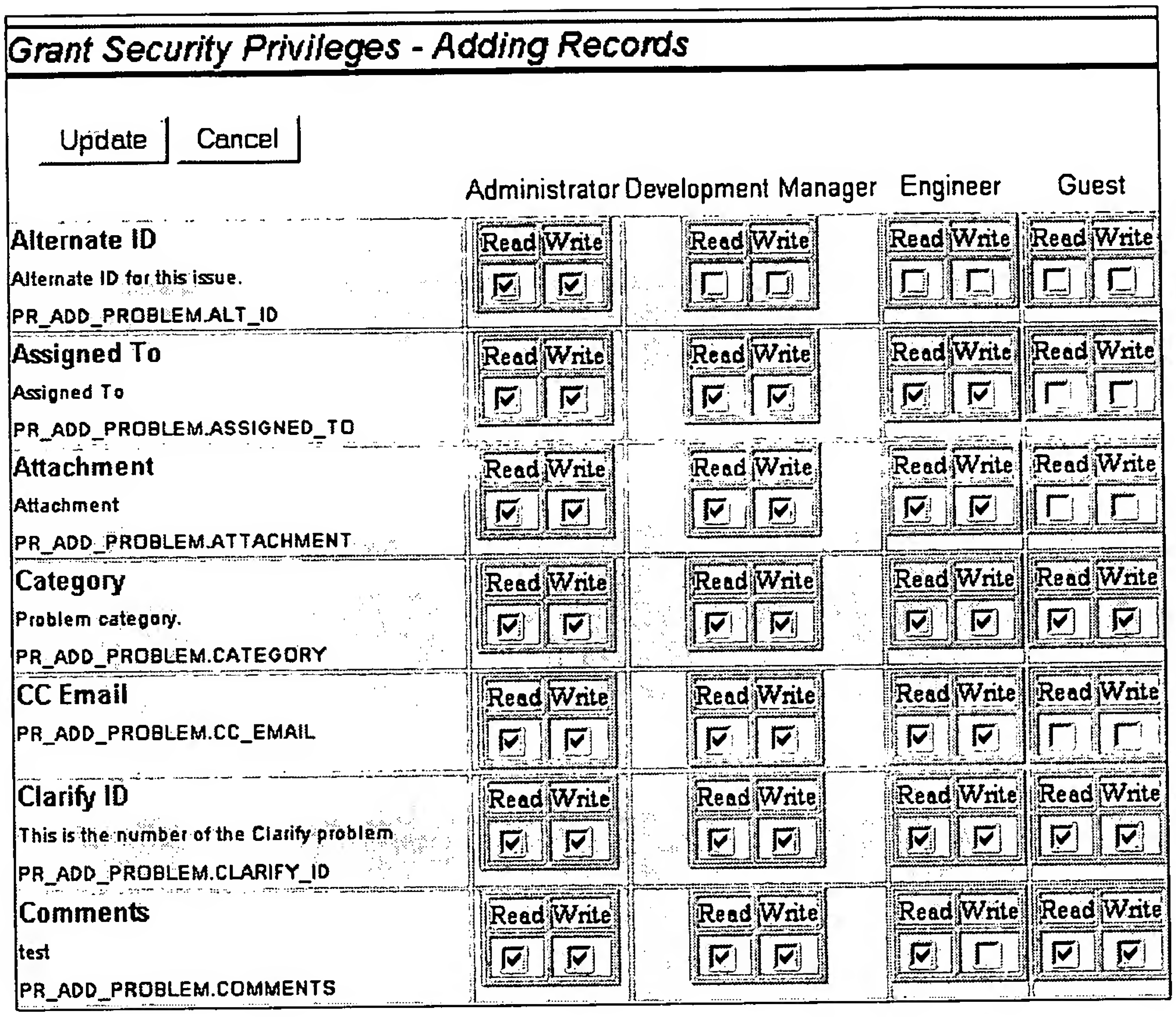


Grant Security Privileges screen

This screen gives you access to all of the System Security Keys. The options are as follows:

- Security permissions for adding records (Add Problem Items)
- Security permissions for editing records and querying (Edit and Search Screen Items)
- Security permissions for administration options (Administration Options)
- Security permissions for accessing screens (Screen Access Options)
- Security permissions for security access (Security Values within the Status Field on Both the Add and Edit Screens)
- Security permissions for statuses (Status Values within the Status Field on Add and Edit Screens)

By clicking on one of the above options, the administrator has the ability to set read and write privileges for any function in the entire system.



Grant Security Privileges Screen

Make a Field or Option Read Only

1. Identify the column head for the User Group whose privileges you would like to change.
2. Put a check mark in the **Read** box for that User Group only.
3. Click the **Update** button.

This change will make the field that corresponds to the given security key read only for the selected user group.

Make a Field or Option Write Only

1. Identify the column head for the User Group whose privileges you would like to change.

2. Put a check mark in the **Write** box, for that User Group only.

3. Click the **Update** button.

This change will make the field that corresponds to the given security key writable for the selected user group.

Make a Field or Option Read and Write for a Particular User Group

1. Identify the column head for the User Group whose privileges you would like to change.

2. Put check marks in both of the boxes, for that User Group only (Read and Write).

3. Click the **Update** button.

Make a Field Invisible to a Particular User Group

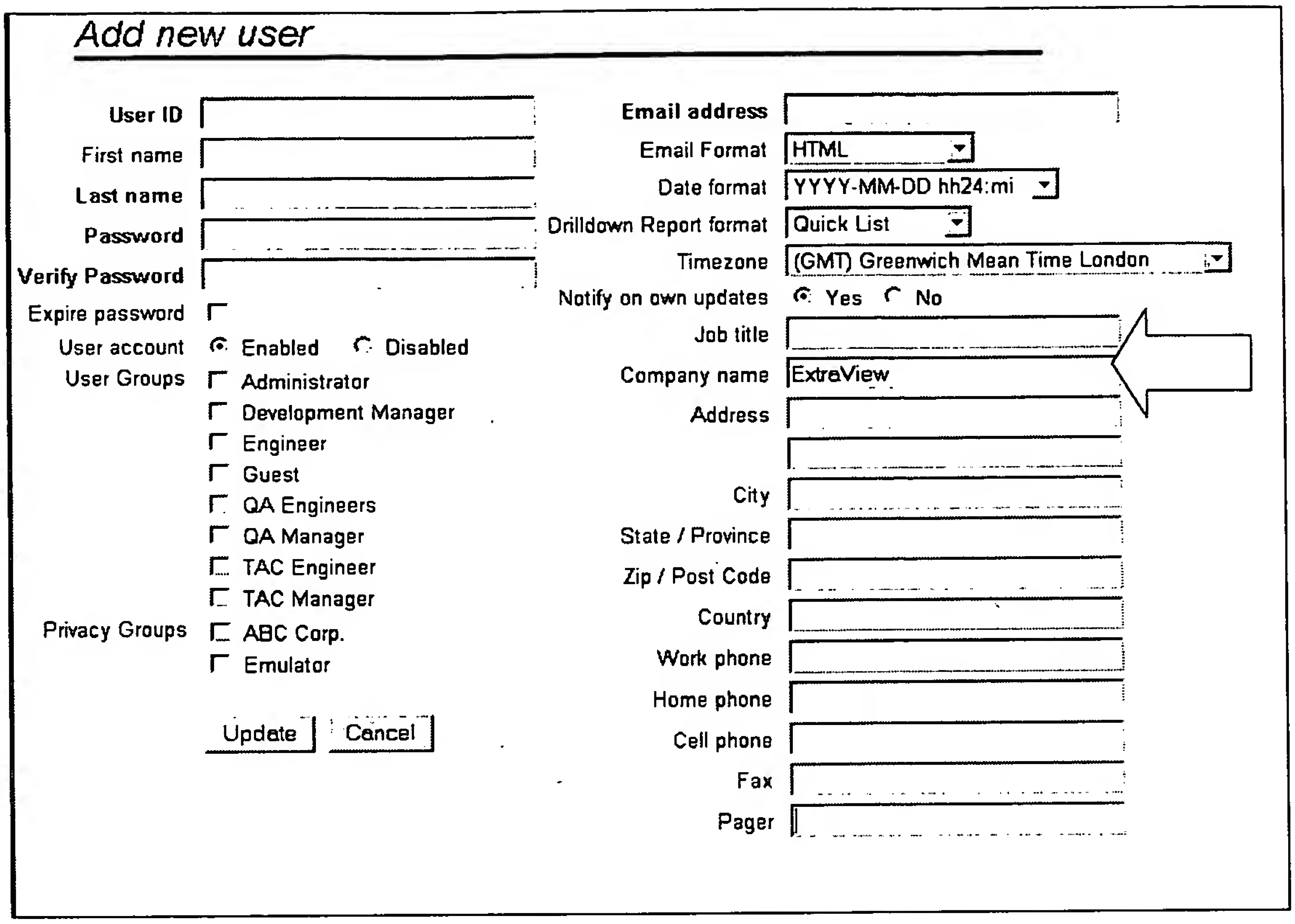
1. Identify the column head for the User Group whose privileges you would like to change.

2. Remove the check marks from both of the boxes for that User Group (Read and Write).

3. Click the **Update** button.

Company Name Security

There is an application default in Administration under Installation & Setup that is entitled COMPANY_NAME. ExtraView recognizes this as the main company name. Given that this is the case, a new user added with a company name that is different than the value in the field associated with COMPANY_NAME will not be able to see PRIVATE issues submitted by users in your company. This is especially beneficial if you have customers using the system, and you only want them to be able to add issues.

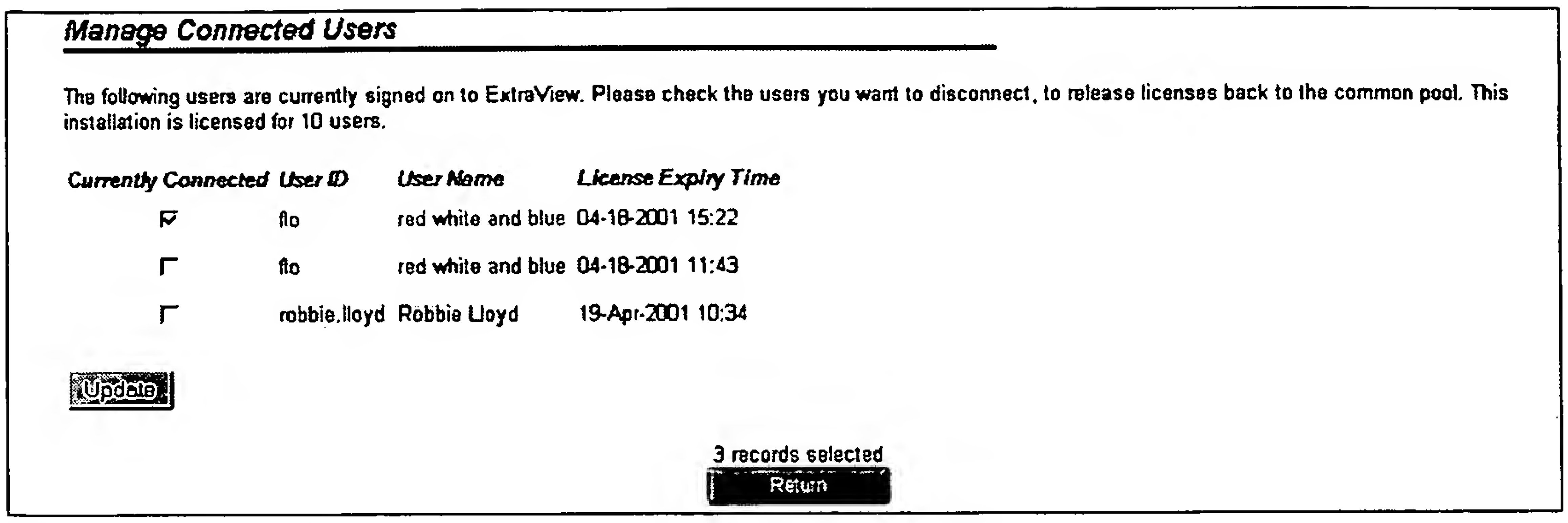


Add a New User screen

If you have users/customers who self-register, they will able to enter your company name (COMPANY_NAME), but they will automatically be assigned to the user group entered as the DEFAULT_USER_GROUP. The DEFAULT_USER_GROUP is set in the Default Values and Behavior Settings. This group normally has minimal user privileges. By being added to this group, the user will only be able to view PUBLIC records until a System Administrator re-assigns them to one or more User Groups.

Manage Connected Users

This feature gives the System Administrator complete knowledge of who is on the system at any time. The System Administrator is also permitted to sign off any inactive users who may have forgotten to sign off, in order to let other users access the system. system by selecting a user and pressing the *Update* button.

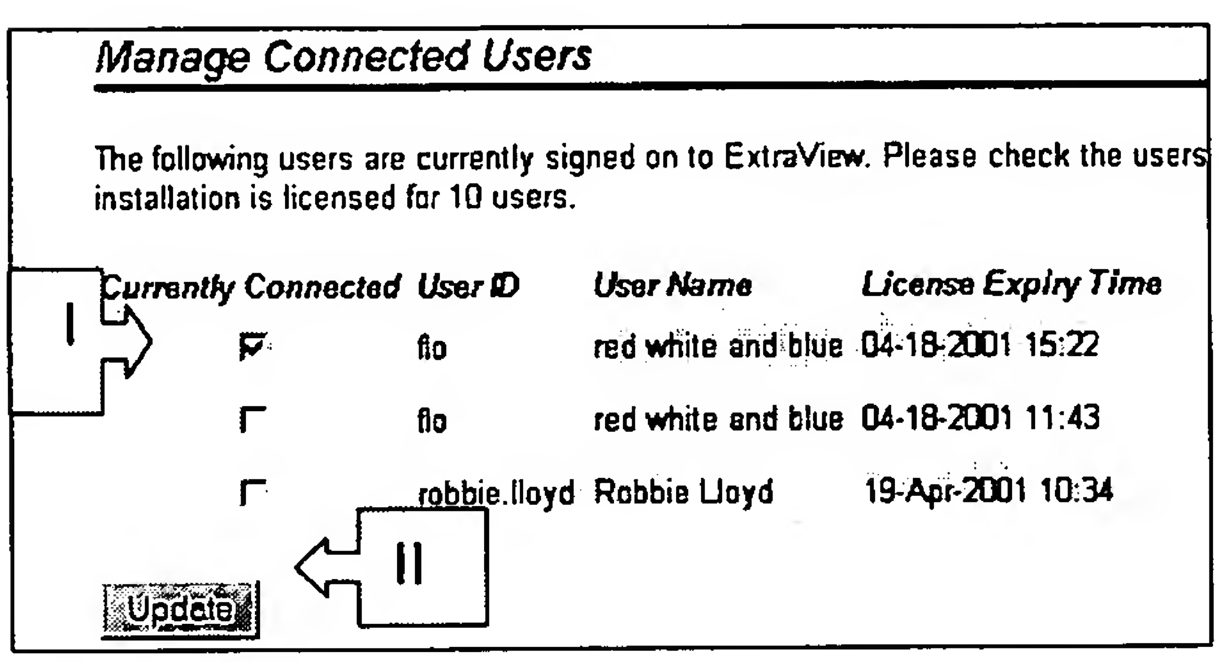


Manage Connected Users screen

This feature may or may not appear, depending on the type of licensing that a user possesses. If you have concurrent licensing, you will receive this feature, and you will be able to allow only a limited number of persons to access the system.

Disconnect Inactive Users

1. Click **Manage Connected Users** on the Administration menu.
2. Click on the checkbox associated with the user(s) whom you want to remove from the system (I).
3. Click the **Update** button (II). This action will force the selected user sessions to expire and open up concurrent license seats.

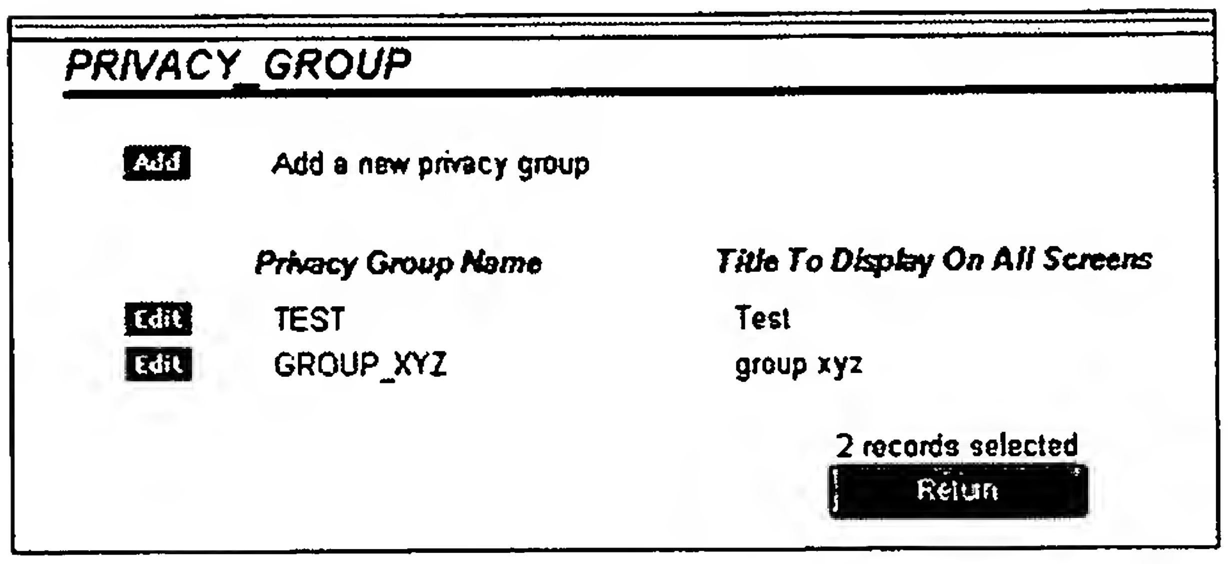


Manage Connected Users screen

Privacy Groups

Privacy Groups are a feature that allows the System Administrator to divide information and data in the system so that select users can be excluded from access to certain problems (something that the PRIVATE designation does not provide). Also, this functionality differs from controlling access through read and write Security Privileges by

virtue of the fact that Privacy Groups do not control access by limiting field-level views of data records, but rather limit access to the data record itself.

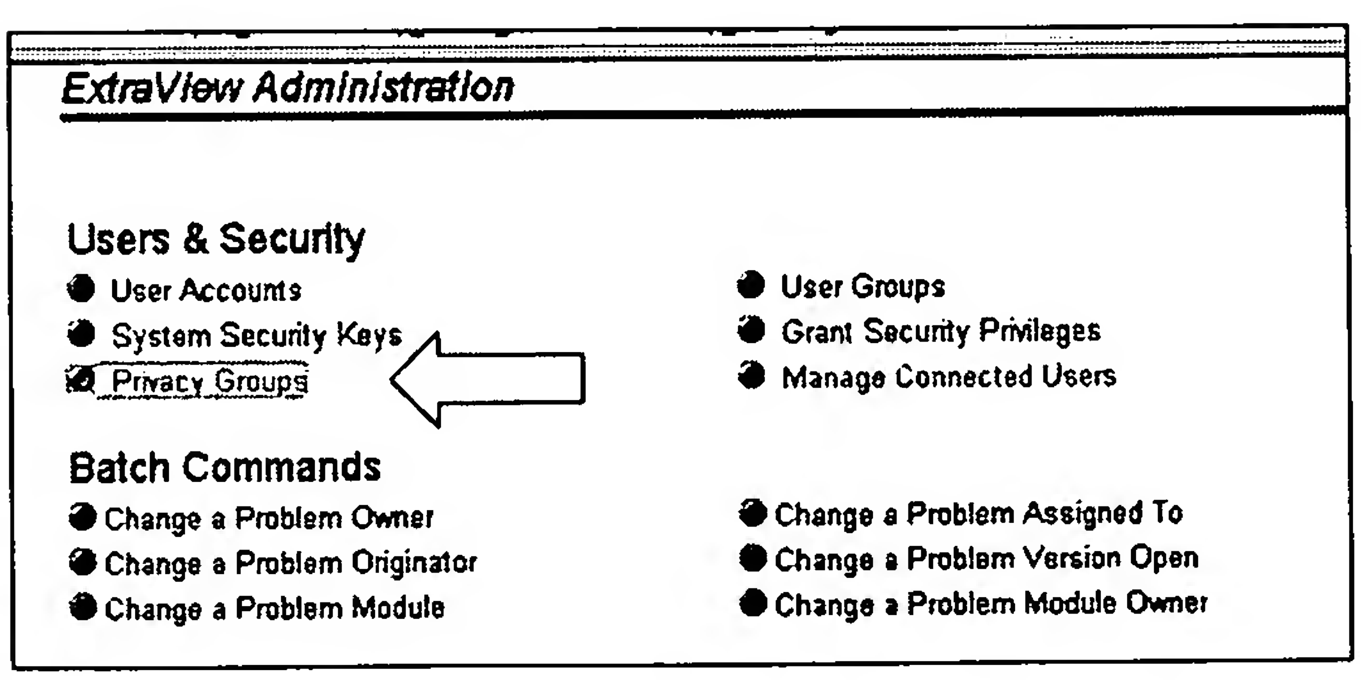


Privacy Groups

For example, if I belong to the Test Privacy Group, then anyone in that privacy group can see my problems, but no one outside the privacy group can do so (unless the value in COMPANY_NAME is the same as the host company name). Additionally, as a member of the Test Privacy Group only, I cannot see any problems that have been submitted by members of the XYZ Privacy Group. The only users that are allowed access to these issues are the members of the host company that have the COMPANY_NAME value, and any other user whom belongs to the XYZ Privacy Group. Finally, if the problem is made PUBLIC instead of PRIVATE, then everyone who uses the system can see the record, regardless of the Privacy Group to which they belong.

Add a Privacy Group

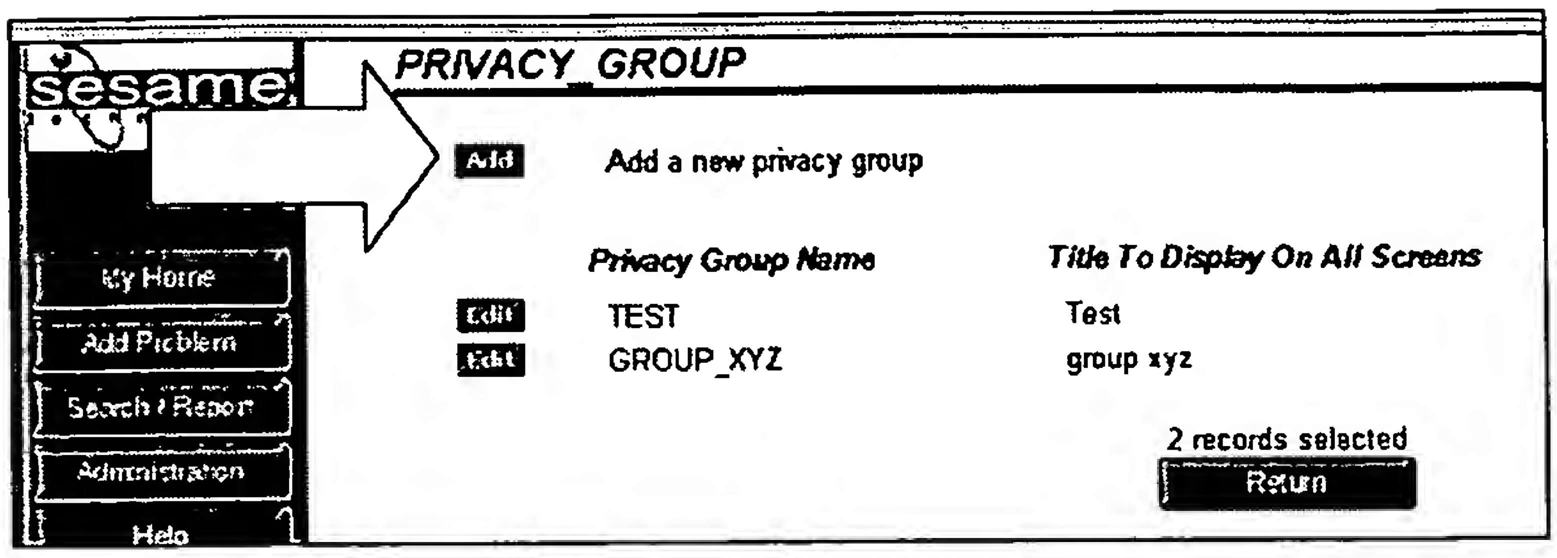
1. Click on **Privacy Groups** under Users & Security on the Administration menu.



Administration menu

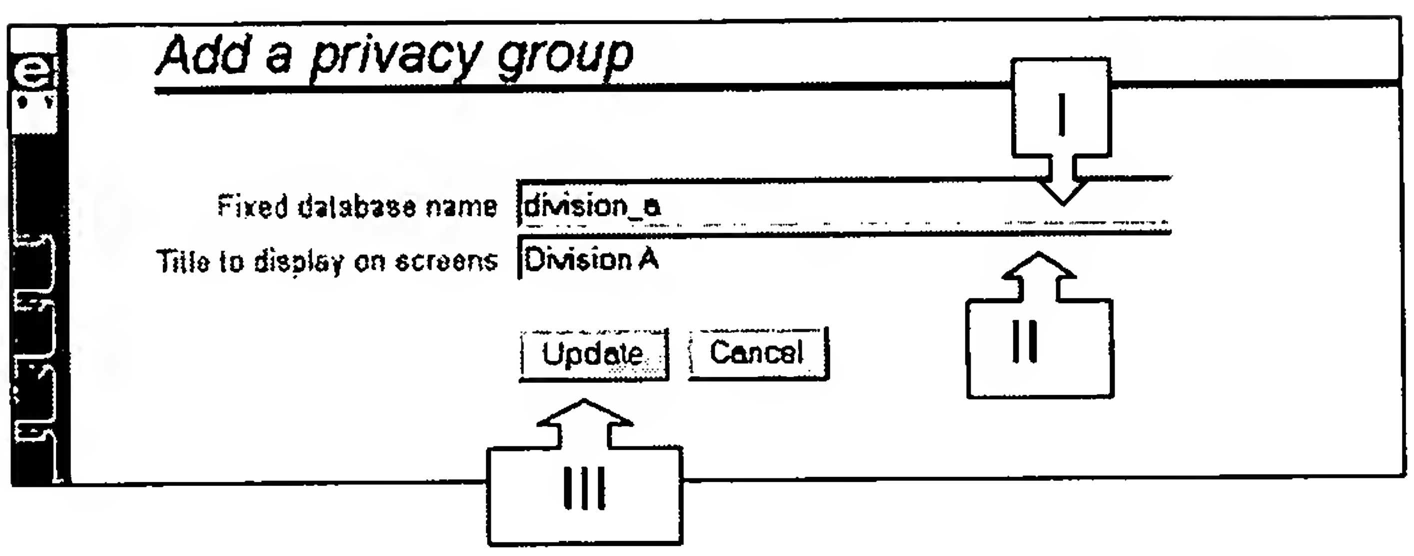
The Privacy Group screen appears.

2. Click on the **Add** button.



Privacy Group screen

The Add A Privacy Group screen appears.



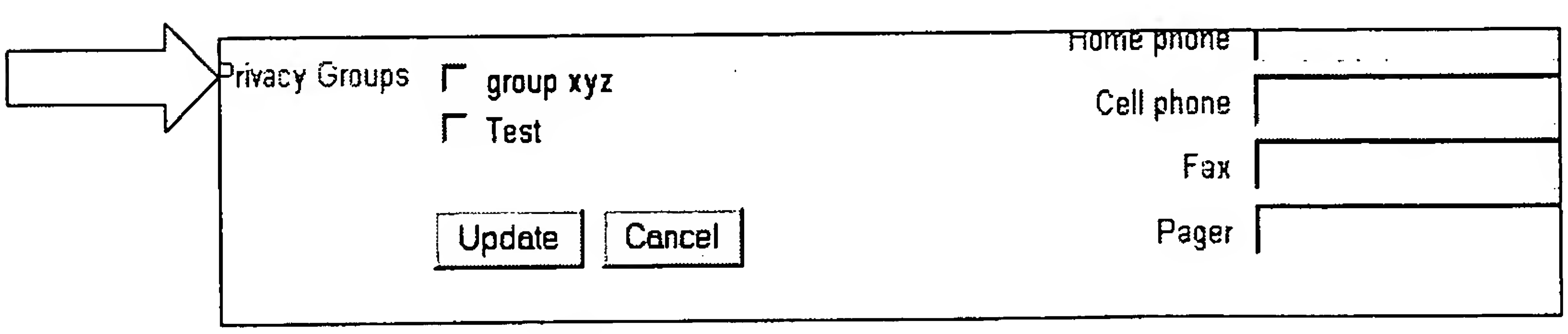
Add Privacy Group screen

3. Type in the name of your new Privacy Group that is relevant to the group name as a title (I). Database names have no spaces, and are composed of letters, numbers, and the characters -, _, and +.

4. Type in a title name (II).

5. Click the **Update** button (III).

The System Administrator may add users to Privacy Groups by clicking the checkbox beside the desired Privacy Group name on the Add New user screen, or the Update User Details screen under User Accounts on the Administration menu.



Add new user screen

BUSINESS RULES & WORKFLOW

In addition to user and security management, ExtraView allows the System Administrator to manage workflow by creating and enforcing state change rules and business rules.

Creating State Change Rules

State Change Rules allow the System Administrator to control the process by which the statuses of issues can be altered. To conform to your company's workflow, ExtraView can create State Change Rules based on three different workflow formats:

I. **Default Format**: All users must follow the same rules for all different product, projects, categories, modules etc.

II. **User Group Format**: Different state change rules apply to different user groups within your company.

III. **Product Format**: Certain products can be changed to statuses that are different from those that apply to other products.

Create State Change Rules

1. From the Administration menu, click on **Default Values & Behavior Settings**.
2. Click the **Edit** button next to the default value entitled ENFORCE_STATE_CHANGE_RULES.
3. Change the value from "No" to "Yes," and click the **Update** button (if the value is already "Yes" then leave it so).

   Note: For the next step, you will have to decide which workflow is best for your company. You are able to choose between DEFAULT, PRODUCT and USERGROUP (as discussed above). The most common choices are DEFAULT and USERGROUP. PRODUCT will only be used if you want to restrict certain products from being set to certain statuses.

4. From Default Values & Behavior Settings, click the **Edit** button next to the SEPARATE_WORK_FLOW default value.
5. Change the value to DEFAULT, USERGROUP or PRODUCT and press the **Update** button.

Customize State Change Rules

From the Administration menu, under Business Rules & Workflow, click on **State Change Rules**.

Based on your choice of workflow format, one of the following three screens will appear (the screens may look slightly different than what is represented here, but the functionality is identical).

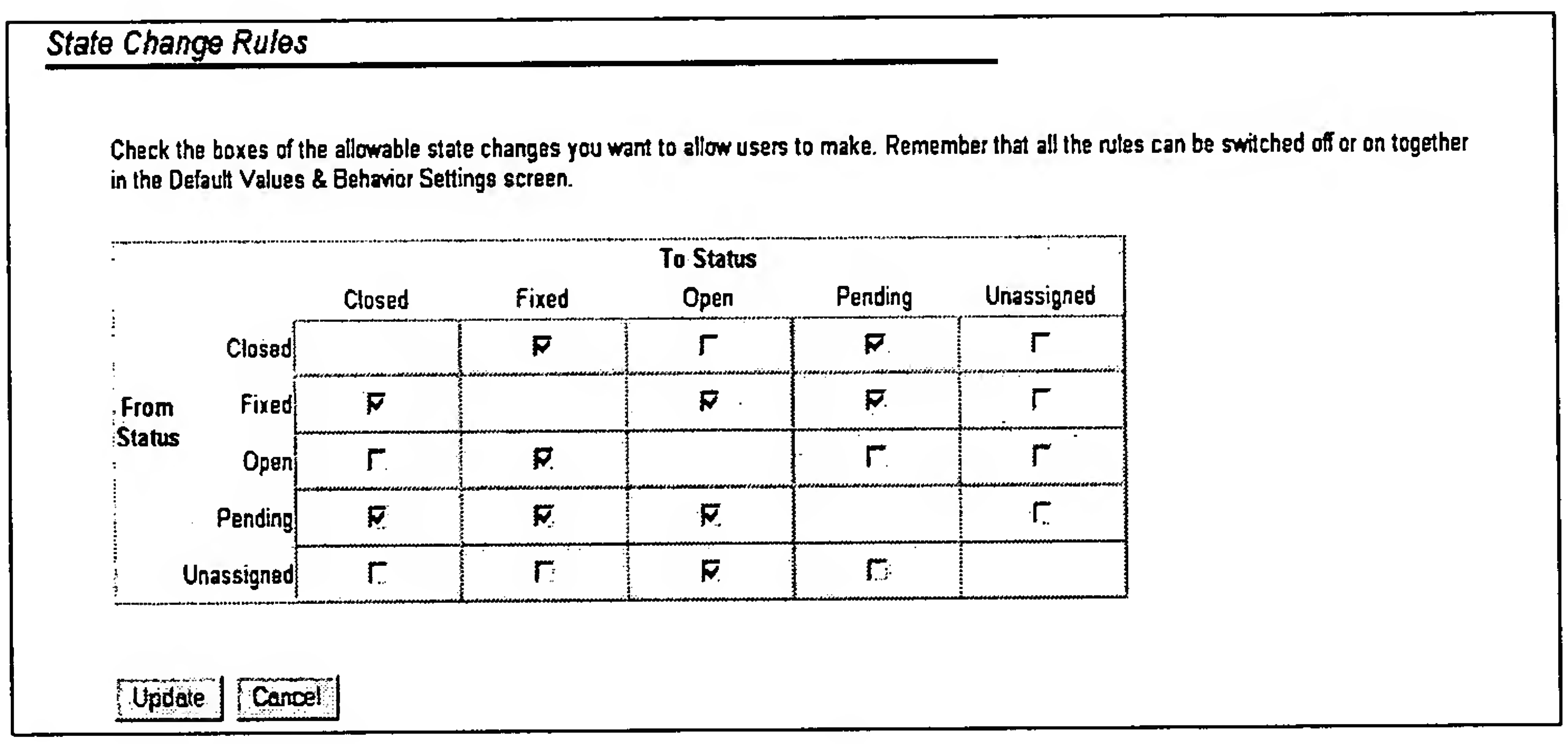


Fig. 1-State Change screen based on selection of DEFAULT

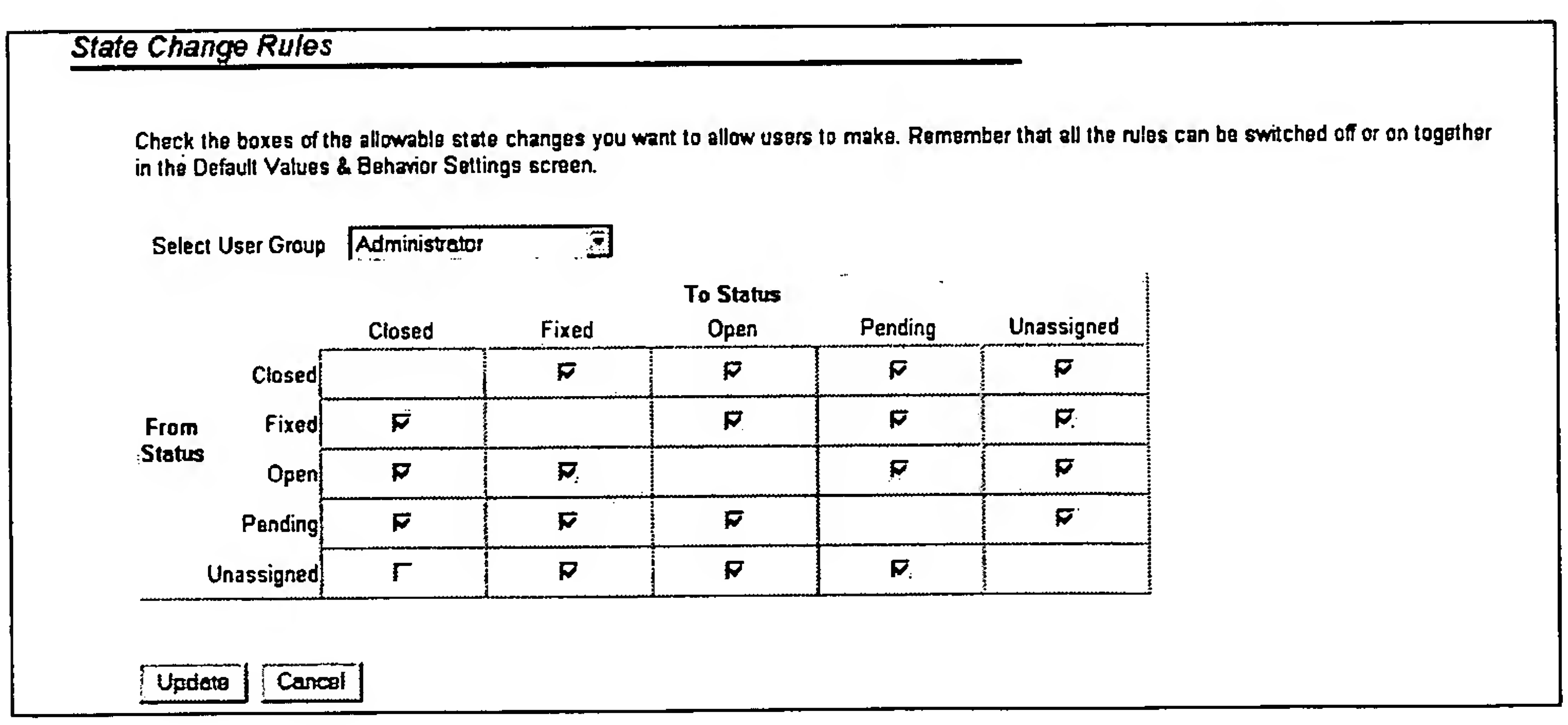


Fig. 2-State Change Rules screen based on selection of USERGROUP

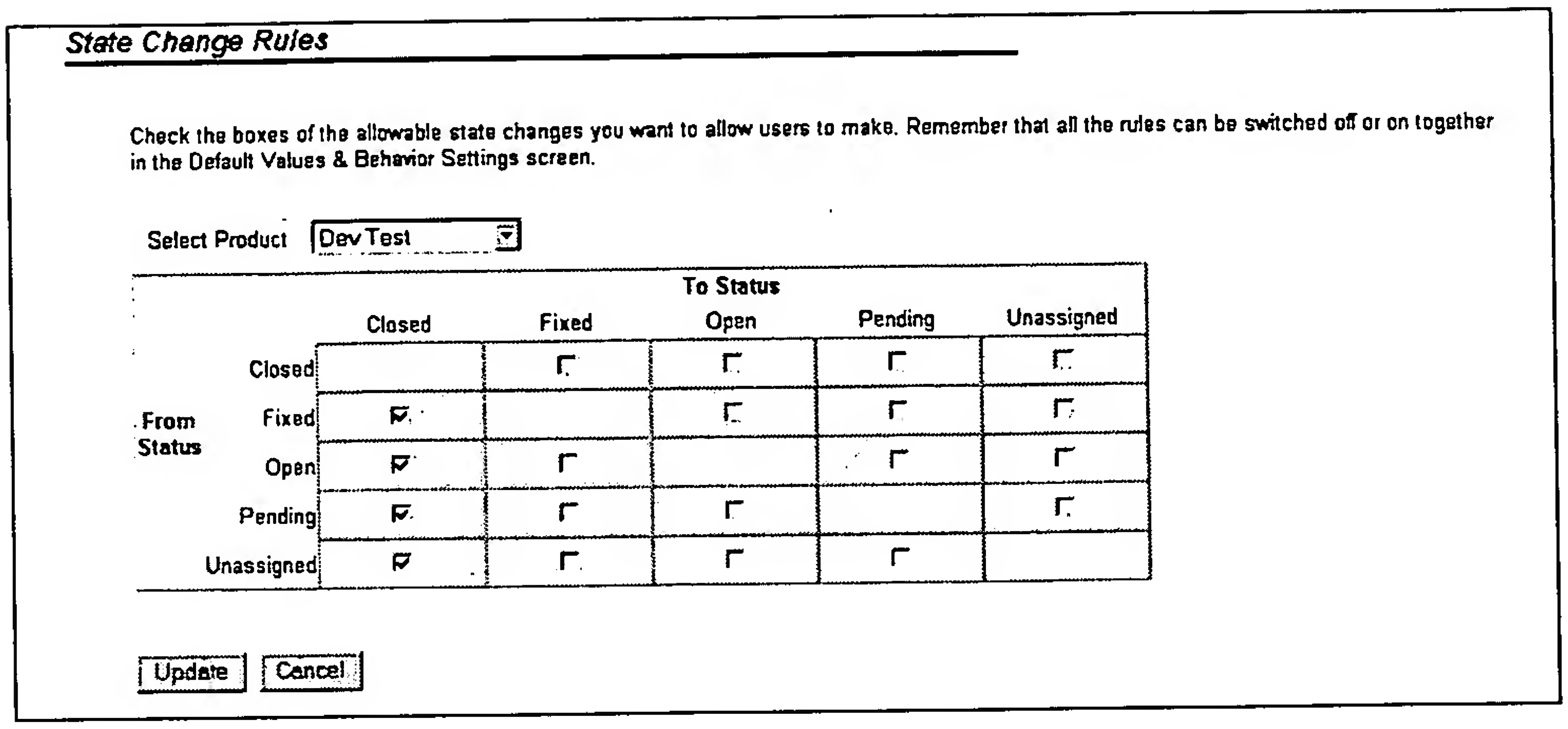


Fig.3-State Change Rules screen based on selection of PRODUCT

Enforce State Change Rules

1. For PRODUCT or USERGROUP workflows, select a PRODUCT or USERGROUP from the dropdown list (there is no need to perform these steps for DEFAULT).

2. Start by clicking the check boxes for each **From Status** (left-hand side) to the **To Status** (right-hand side).

    a. Fig. 1 shows a scenario where a user is able to change the status of an issue from Fixed to Closed, but not from Open to Closed.

    b. Fig. 2 shows a scenario where an Administrator is able to change the status of an issue from Fixed, Open, and Pending to Closed, but not from Unassigned to Closed.

    c. Fig. 3 shows a scenario where the product DEV TEST can be changed only to a status of Closed, and nothing else. This may indicate that the particular company is no longer developing the product DEV TEST.

3. After you are satisfied with the **From** and **To** values, click the **Update** button. Select another **Product** or **User Group** from the list, and follow steps 1 & 2. Do this for each **Product** or **User Group**.

    After your final update, your State Change Rules are fully implemented. You can now test out the functionality by editing an issue and trying to change the **From Status** to a **To Status** that you did not specify.

Customize Business Rules

ExtraView has the ability to apply business rules based on your particular business processes. Customized Business Rules can include: forcing users to add *Release Notes* when they close an issue; making sure that *Comments* are added when a

disposition is *Fixed*; almost anything else you can imagine. The screenshot below is an example of a Customized Business Rule.

Rule 2

This business rule is applied when updating problems only. If you check a disposition then new comments must be added whenever the disposition changes to the values displayed below:

- [ ] Cannot Duplicate
- [ ] Deferred
- [ ] Duplicate
- [ ] Fixed
- [ ] Invalid.
- [ ] Need more info
- [ ] None
- [ ] Not a bug
- [ ] User error

Update | Cancel

Sample Customized Business Rule Implementation screen

Issuing Batch Commands

A Batch Command is an ExtraView feature that allows you to edit any number of records in only a few small steps. Listed below are the standard Batch Commands, although your system may have different Batch Commands or alternative versions of the existing ones.

Batch Commands

- Change a Problem Originator
- Change a Problem Version Open
- Change a Problem Component
- Change a Problem Owner
- Change a Problem Module

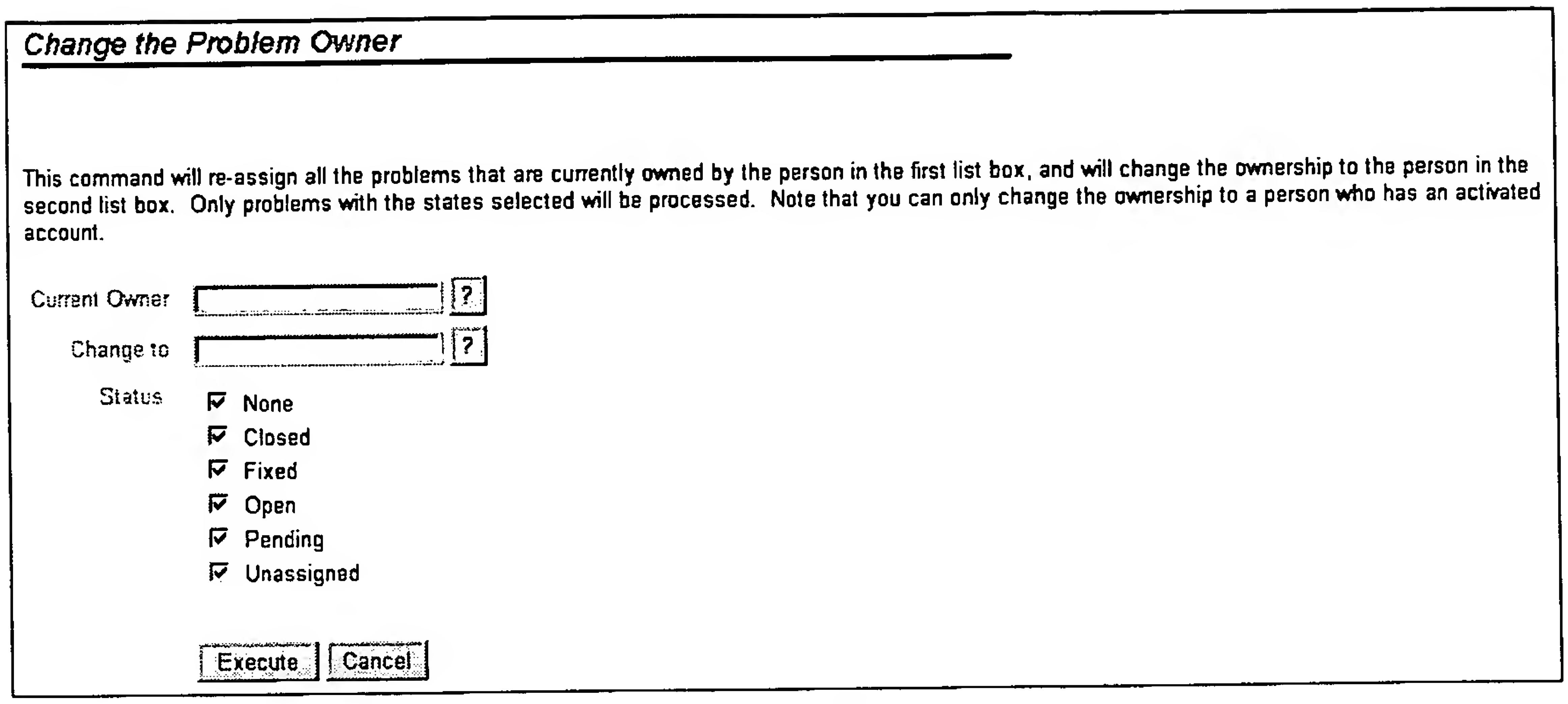
Batch Command Screen

Issue Batch Commands

We will use Owner for purposes of example, but all batch commands will work in a comparable manner.

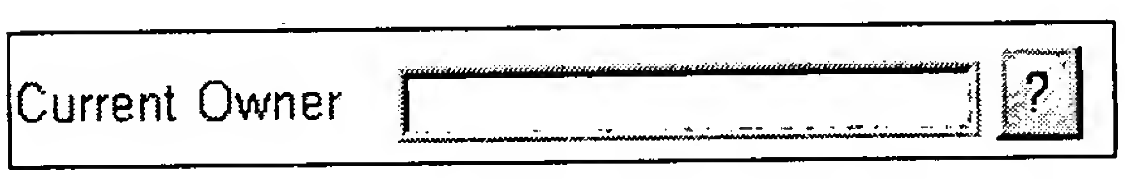
1. From the Administration menu, click on **Change a Problem Owner**.

A screen similar to the one below appears.

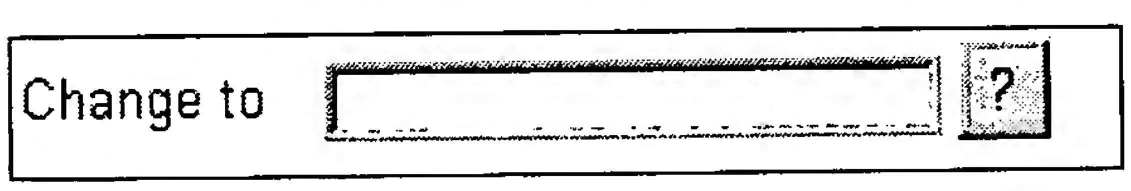


Change Problem Owner Batch Command Screen

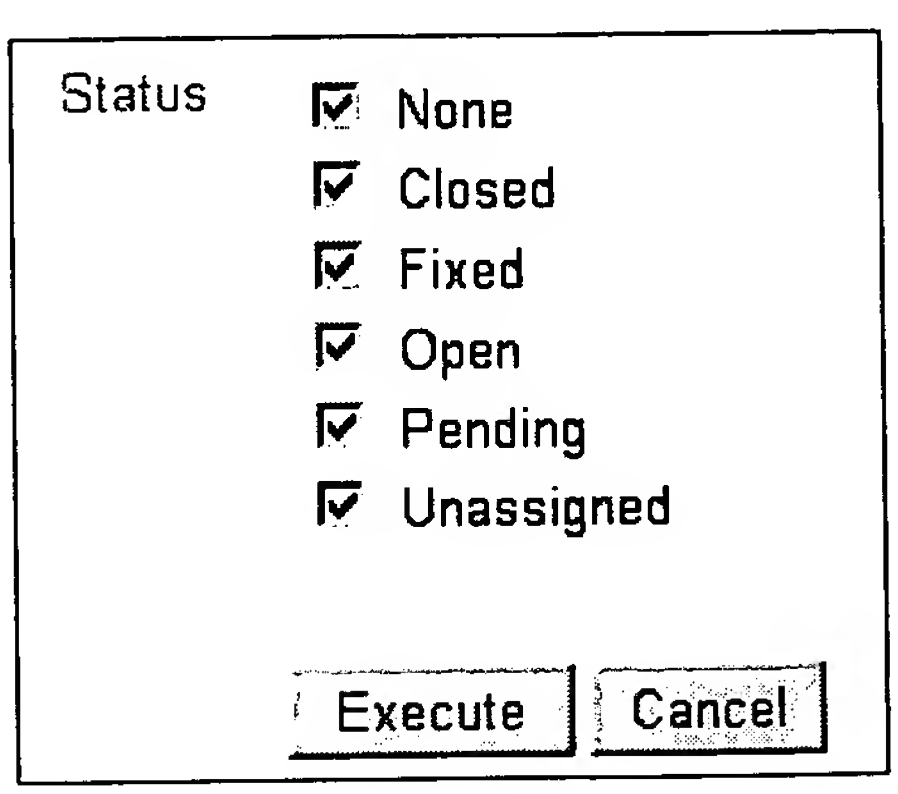
2. Select the **Current Owner** from the dropdown list box, or in this case, from the pop up text box. This is the name of the person whom you no longer want to be associated with the issues.



3. Select the **New Owner** from the dropdown list box, or in this case from the pop up text box. This is the person who will be the new **Owner** of the issues.

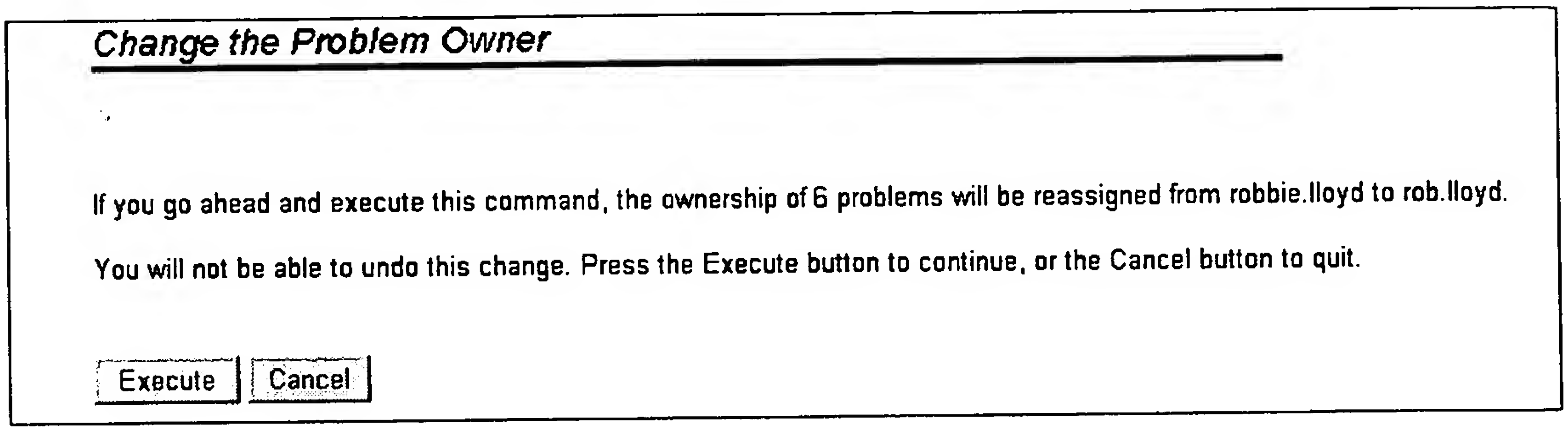


4. Decide which statuses you would like transfer to the new **Owner**, and then check the appropriate boxes.



5. Click the **Execute** button after your statuses have been selected.

   The changes may affect a large number of records in your database; the screen below gives you a final opportunity to cancel or to continue with the change.



Batch Command Confirmation Screen

6. Click the **Execute** button to proceed with the batch change. Click **Cancel** if you do not want to follow through with these modifications.

EMAIL FEATURES

ExtraView offers a number of email features that designed to facilitate maximum flexibility in managing inter-group, cross-functional, and business-to-customer communication. At the highest level, this section will be divided into the following three heads: Email Notification, Email Generation, and Interest Lists.

As a general default, ExtraView automatically sends email to the person who Originated an issue, the person who is Assigned to the issue, and the person who is selected as the Owner of the issue. Listed below are the email functions that may be defined by the Administrator and the user. The main email functions include:

Administrator-Defined Features

- Turn System-Wide Email On or Off
- Disable Email Generation for User Groups
- Enable or Disable Email to External Users
- Assign Module Owner
- Set Product Email Address
- Customize Email Subject Line
- Show Recipients at Bottom of Email

User-Defined Features

- Notify of Own Updates
- Select Email Format
- Disable Automatic Email Generation
- CC Email

Turning System-Wide Email On or Off

1. From Administration menu, click on **Default Values and Behavior Settings.**

2. Scroll down until you see EMAIL_NOTIFICATION.

3. Click Edit and change the value to "Yes", in order to turn on Email Notification, or set the value to "No" to turn off **Email Notification** system-wide.

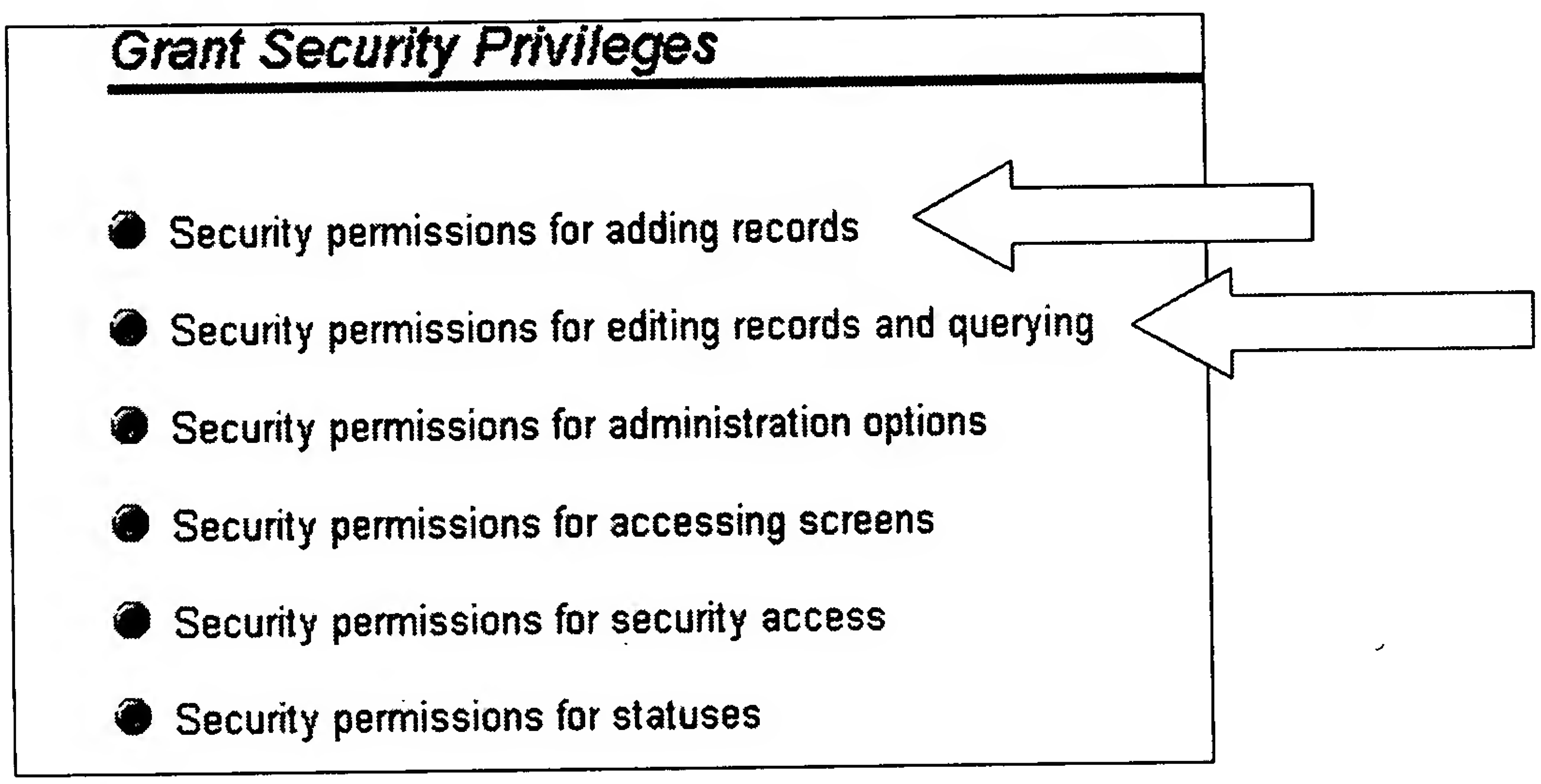
4. Click the **Update** button.

Disable Automatic Email Generation for User Groups

The System Administrator may turn off the Generate Email field for particular User Groups, so that users belonging to these groups will not have the option to disable automatic email generation.

1. From the Administration menu, click on **Grant Security Privileges**.

   The following screen will appear:



Grant Security Privileges Screen

2. To turn the Generate Email field option off for the Add Problem screen, click **Security Privileges for Adding Records**.

3. To turn the Generate Email option off for the Edit Problem screen, click **Security Permissions for Editing Records and Querying**.

4. Scroll down until you see PR_ADD_PROBLEM.EMAIL_SWITCH (this is for the Add screen) and PR_RESOLUTION.EMAIL_SWITCH (this is for the Edit screen).

To turn this field off for a specific User Group, uncheck the **Read** and **Write** boxes (for that group only) and click the **Update** button at the bottom of the screen.

Disable Include Guests for Screens or User Groups

1. From the Administration menu, click on **Default Values and Behavior Settings.**

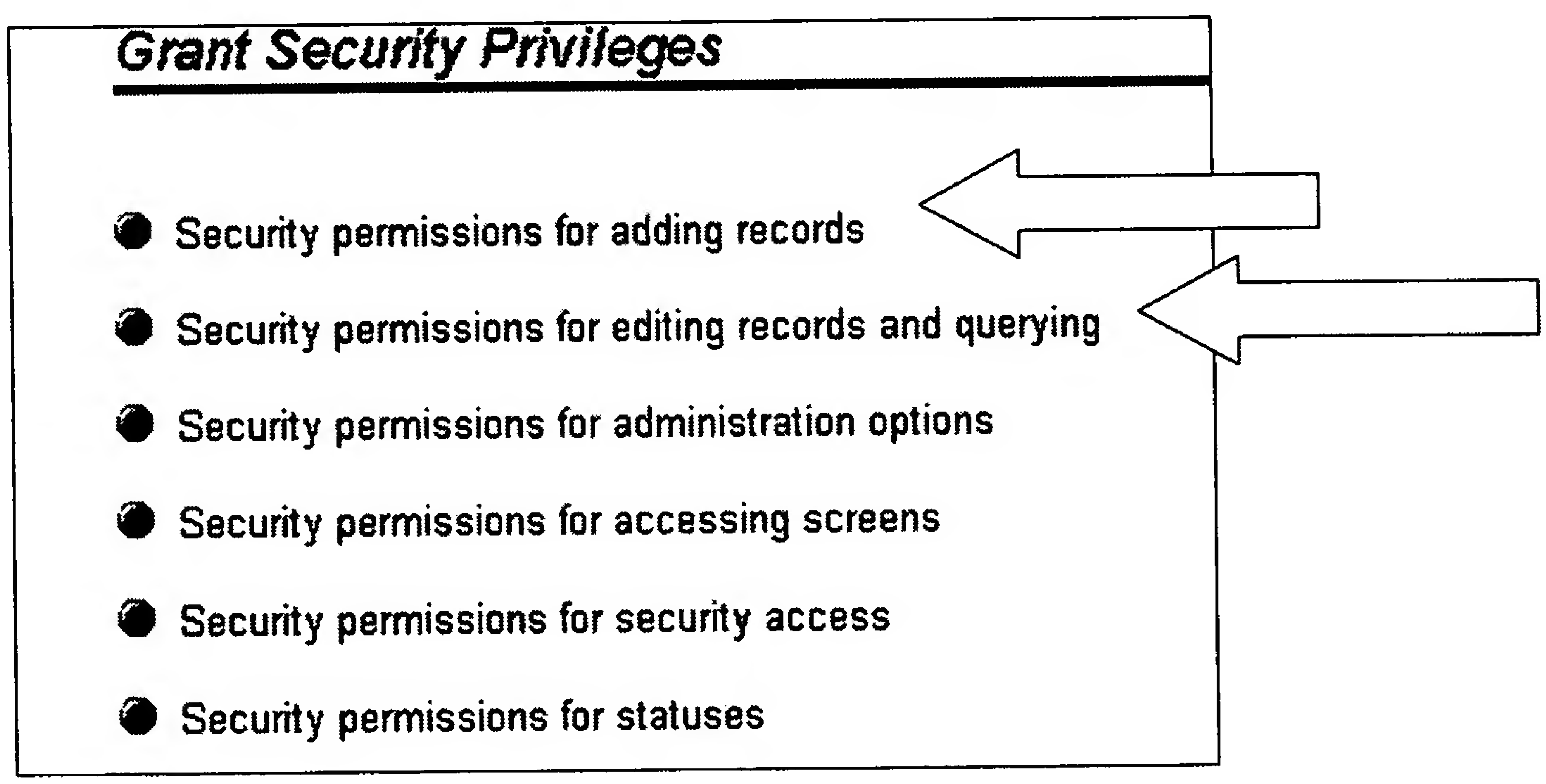
2. Verify that IGNORE_USER_GROUP is equal to the user group you are using for external users. This is normally Guest or Customer.

3. If you make a change, be sure to click the **Update** button.

4. From the Administration menu, click on the option that says **Grant Security Privileges.**

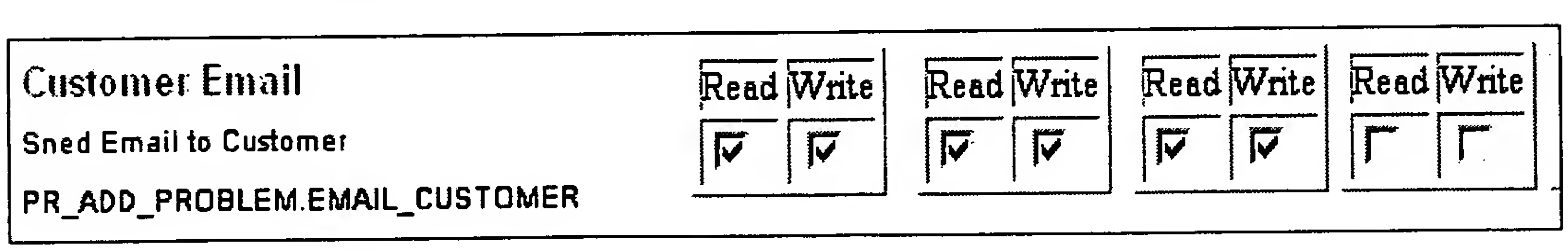
5. To turn the External Email option off for the Add Problem screen, click **Security Permissions for Adding Records**.

6. To turn the External Email option off for the Edit Problem screen, click **Security Permissions for Editing Records and Querying**.



Grant Security Privileges Screen

7. Scroll down until you see PR_ADD_PROBLEM.EMAIL_CUSTOMER (this is for the Add screen) and PR_RESOLUTION.EMAIL_CUSTOMER (this is for the Edit screen).



Security Privileges for Emailing External Users

8. To turn this field on or off for a specific user group, check or uncheck the appropriate **Read** and **Write** boxes (for that group only) and click the **Update** button at the bottom of the screen.

Assign Module Owners

The System Administrator may assign Module Owners, such that state changes to given modules produce automatic email notification for designated owners.

1. From the Administration menu, click **Module Names**.
2. Locate the Module to which you would like to assign an Owner, and click the associated **Edit** button.
3. Scroll through the list of available users or else select the owner from the pop up text box.
4. Click the **Update** button.

Set Product Email Address

The System Administrator may set an email address for specific *products*, so that ExtraView users associated with that *product* will receive automatic email notification about product-related issues.

Customize Email Subject Line

ExtraView gives the System Administrator the ability to customize the subject line of incoming emails.

1. From the Administration menu, click on **Default Values and Behavior Settings.**
2. Scroll down until you see EMAIL_SUBJECT_TEMPLATE and click the associated Edit button.
3. Type in the names of the fields you would like to display. Your custom email subject line can include any field from your ExtraView installation. These values are generated dynamically, based on the particular issue.
4. If you would like values in your email subject line you must surround them with "$$". Normal static values can be typed in. See the example below:

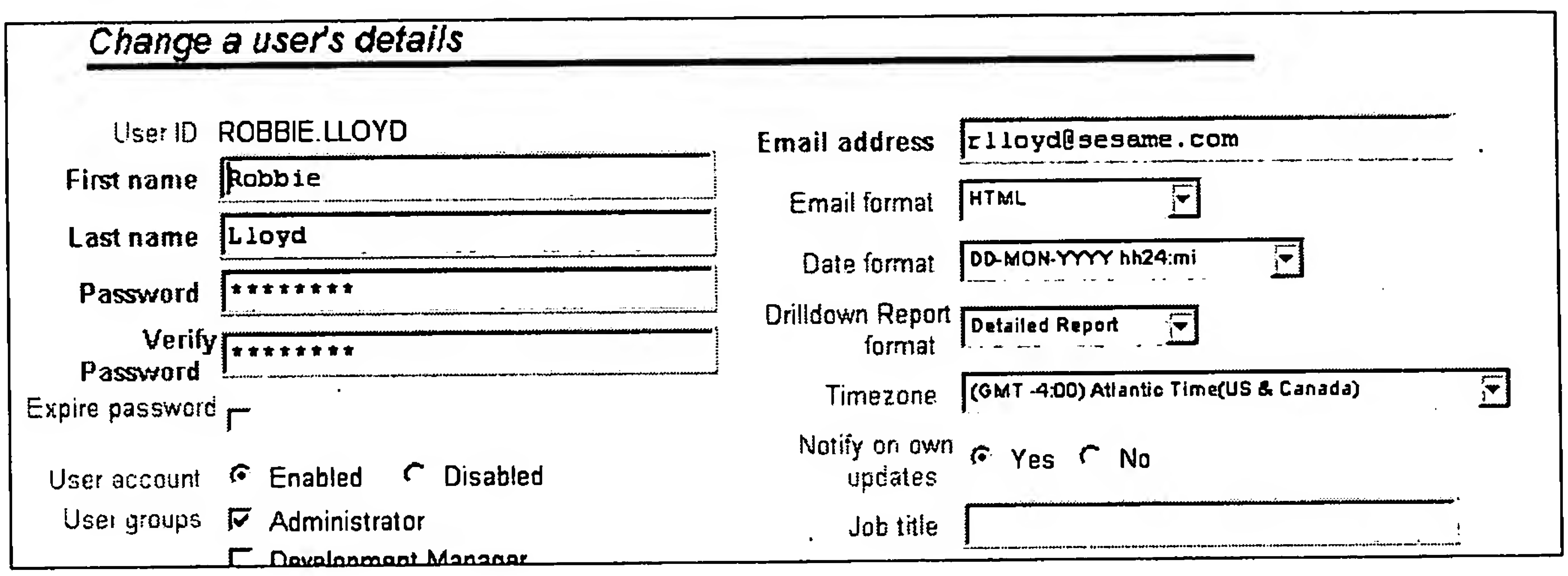
Sample Text	Subject Line Output
$$ID$$ - $$SHORT_DESC$$	12345 – Problem with List Entries
$$ASSIGNED_TO$$ ($$PRODUCT_NAME$$; $$MODULE_NAME$$) - This is an Email	Rlloyd (Product X; Module Y) - This is an Email
Issue # $$ID$$ This is Assigned to $$ASSIGNED_TO$$	Issue # 12345 This is Assigned to Rlloyd

Notify of Own Updates

This feature gives you the option to disable automatic email to yourself on issues that you **Add** or **Edit**.

1. From the Administration menu click on the User Accounts option

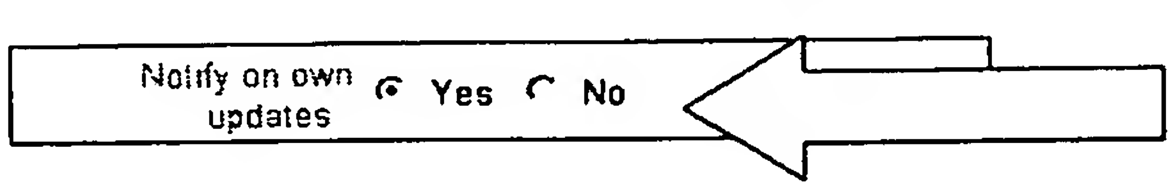
2. Click the *Edit* button next to your User ID. A screen similar to the one below will appear.



Change a User's Details screen

*Note: Users can also turn this feature "On" or "Off" by clicking on **Click to edit your personal options**, from their ExtraView Home Pages.*

3. If you do not want to receive email notification each time you update an issue, set the value in **Notify of own updates** to "No".



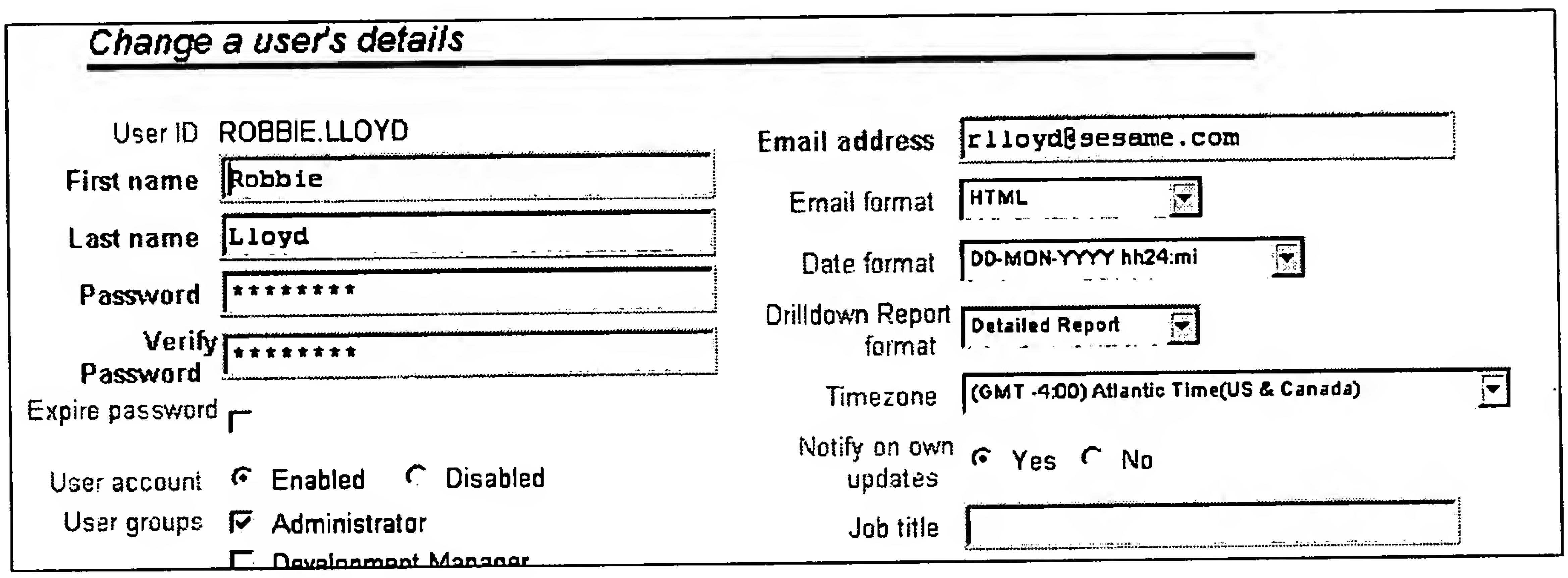
4. Click the **Update** button.

Select Email Format

Choose to display incoming email in one of three formats: HTML, Plain Text (full) and Plain Text (brief). Plain Text (full) displays the entire email, while Plain Text (brief) shows just a few lines, so that the issue may be recognized.

1. From the Administration menu, click on the **User Accounts** option
2. Click the **Edit** button next to your User ID.

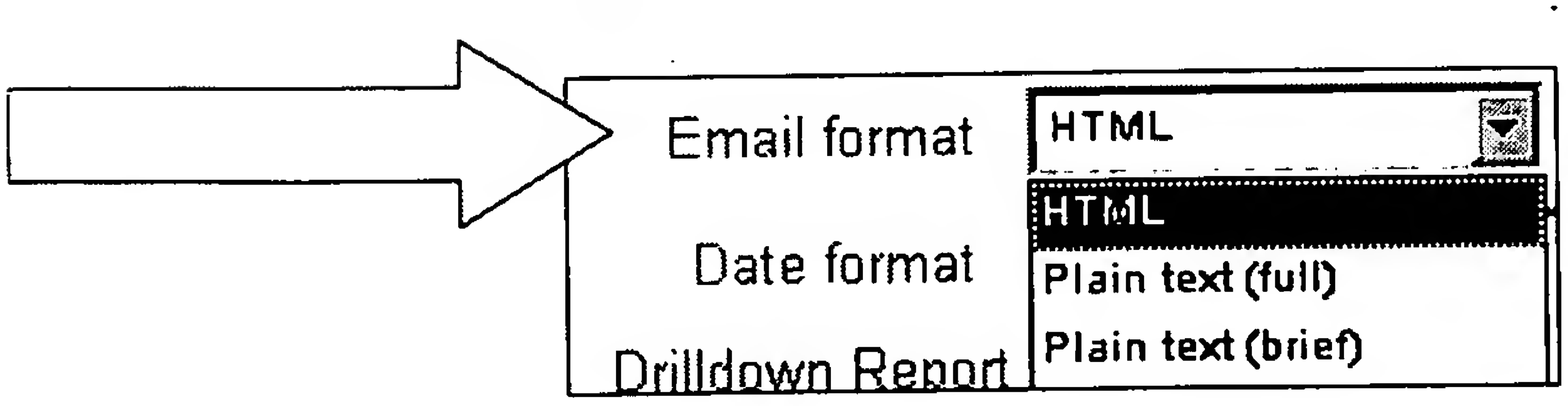
A screen similar to the one below appears.



Change User Details screen

*Note: Users can also turn this feature "On" or "Off" by clicking on **Click to edit your personal options** from their ExtraView Home Pages.*

3. The default email format is HTML. If you would like to see your email notifications in another format, select the desired format from the **Email format** list.



Email Format Option

Below are examples of the different email formats:

Subject: DEV - 12231
Date: Fri, 15 Jun 2001 16:53:09 -0700 (PDT)
From: "ExtraView"<extraview.qa@sesame.com>
To: "Robbie Lloyd"<rlloyd@sesame.com>

Edit	Bug #	Title		
	12231	test		
Product	Owner	Created	Last Modified	
NetOp	udele malabanan	08-MAR-2001	15-JUN-2001 10:51	
Category	Assigned To	View	Alt ID	Changed By
Hardware	rob lloyd	Private		ROB.LLOYD
Severity	Priority			
	m2			
Module				
PM				
A Component	Platforms	OS	Clarify ID	Customer
	800 TDM			
Test Case ID	Test Case Location			
Version Open	Status	Version Closed	Disposition	
1	Closed			
Description				
test				
Comments				
Workaround				
Release Notes				
Enclosures		Attachments		

cc: Michelle Medina, rob lloyd, Robbie Lloyd.

HTML Email

```
   Subject: Open  [#19419]: Category doesn't seem tied to Product anymore
      Date: Wed, 2 May 2001 13:57:53 -0700 (PDT)
      From: "ExtraView" <extraview-user@customer.com>
        To: <support@sesame.com>


ExtraView Notification for Bug # 19419

*Synopsis: Category doesn't seem tied to Product anymore

Link: http://www.extraview.net/extraviewsql/SE_Signon.FrameSet?p_case_id=19419

*Product: Dev Tools
*Originator: rlloyd
*Owner: rlloyd
*Changed By: dwong
*Priority: 1
 Severity:
*View: Private
*Last Modified: 02-MAY-2001 13:57
*Category: Software
 Alt ID:
 Created: 02-MAY-01

*Module: ExtraView
 Component:
*Platform: all
 OS:
 Clarify ID:
 Test Case ID:
 Test Case Location:
 Problem Reproducible in SQA:

*Version Open: 3.1.2.1
*Status: Open
 Version Closed:
 Disposition:

*Description:
If you select Product=EV, Category=Software, you will see two modules called
"EV".  Go into Admin...Modules and one is Hardware, one is Software.

 Comments:

--------------------------------------------------------------------------------
ExtraView - Copyright Sesame Technology 1999, 2000. All rights reserved.
```

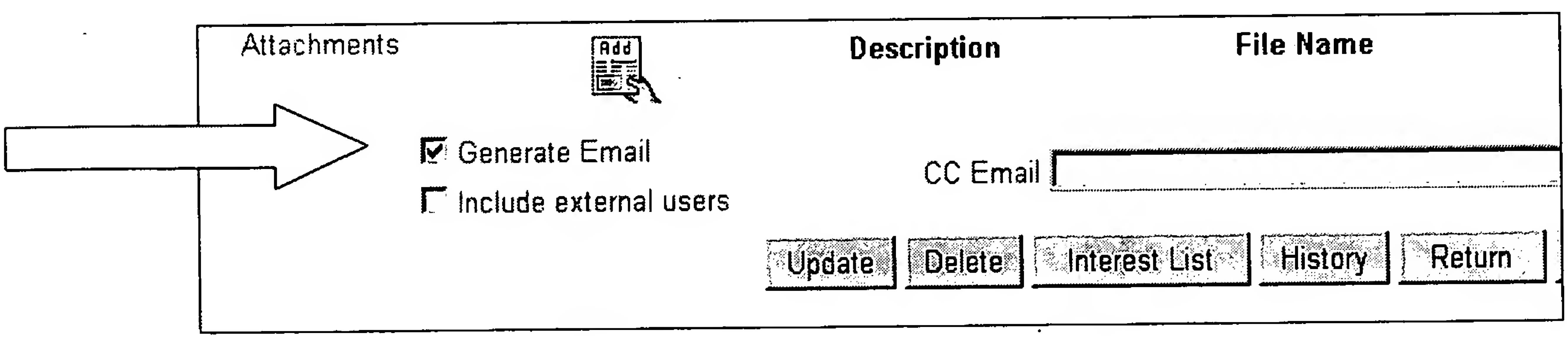
Plain Text (Full)

```
   Subject: Open  [#19419]: Category doesn't seem tied to Product anymore
      Date: Wed, 2 May 2001 13:57:53 -0700 (PDT)
      From: "ExtraView" <extraview-user@customer.com>
        To: <support@sesame.com>


ExtraView Notification for Bug # 19419

*Synopsis: Category doesn't seem tied to Product anymore

Link: http://www.extraview.net/extraviewsql/SE_Signon.FrameSet?p_case_id=19419

*Product: Dev Tools
*Originator: rlloyd
*Owner: rlloyd
*Priority: 1
 Severity:

---------------------------------------------------------------------------------
ExtraView - Copyright Sesame Technology 1999, 2000. All rights reserved.
```

Plain Text (Brief)

Disable Automatic Email Generation

Each time a user Adds or Edits an issue, he or she has the opportunity to halt all email generation by un-checking the **Generate Email** checkbox at the bottom of the Add and Edit screens.



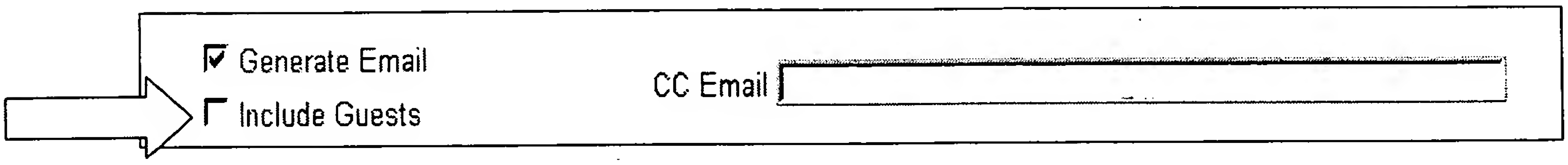
Email Portion of Edit Screen

Note: the Edit screen can be accessed by drilling down on your Home Screen folder, from the Add Problem Summary Screen, from email notification, as well as from various reports.

Disable Generate Email to External Users

Situations often arise where a customer may need to enter an issue, but you may not want the customer to see all of the different state changes that the problem issue goes through. When you **Add** or **Update** an issue, you have the option of halting email to external users.

1. At the bottom of the **Add** and **Edit** screen you will see something similar to the screenshot below. The default setting is not to send email to external users.

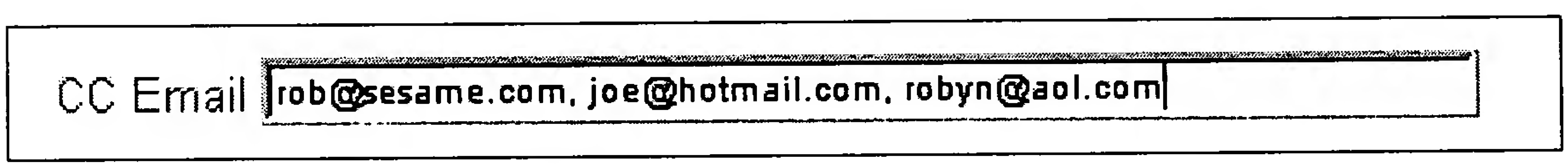


2. If you would like your external users to receive an email, click the **Include Guests** check box and continue to update the issue.

Enable CC Email

This feature gives users the opportunity to send a one-time email to people who are not directly associated with a particular issue.

1. To utilize the CC Email functionality, type email addresses (separated by commas or semi colons) into the CC Email field prior to updating the issue.



CC Email Field

Email Interest Lists

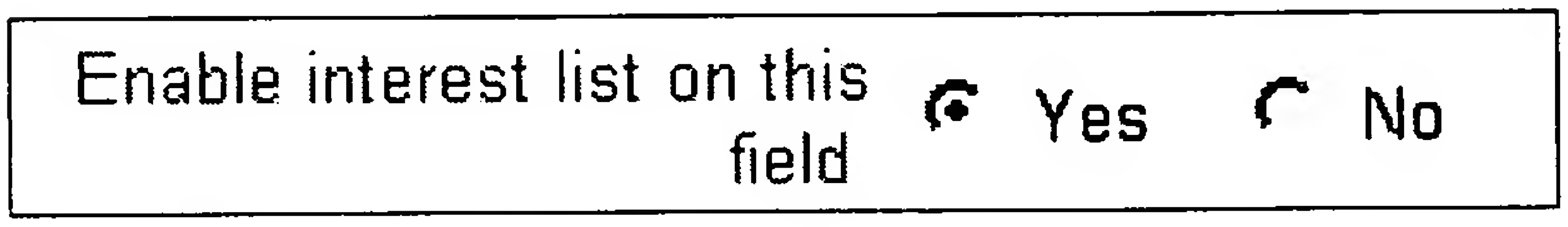
ExtraView allows users to subscribe to interest lists for nearly any field in the system. An Interest list allows users to receive emails about particular Metadata in the system. For example, you may want to notify a certain user each time an issue goes to a *Severity* of *Critical* or a Status of *Open*. Interest lists can be created for *Products, Modules, Statuses, Priorities, Resolutions*, *Severities* and *User Defined Fields.*

The first example below will illustrate the addition and management of interest list members for normal Configuration items (*Product, Module, Priority etc.).* The second example will be illustrative for User Defined Fields (fields specific to your installation).

Create Normal Configuration Item Interest Lists

Normal Configuration items include items such as *Product*, *Module* and *Priority*. For this example, we will use *Product (*PRODUCT_NAME*)*; adding Interest List members for the other configuration items will be the same.

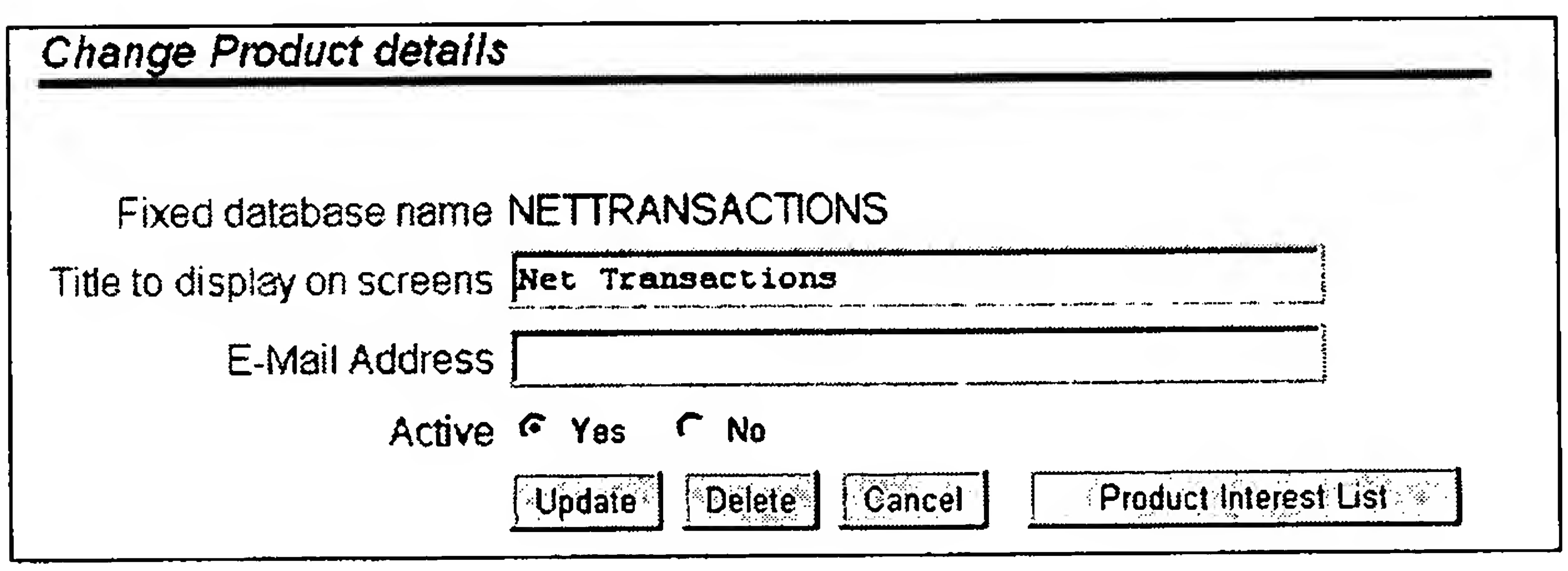
1. From the Administration menu, click **Data Dictionary** under Installation & Setup.
2. Scroll down until you see *Product* (PRODUCT_NAME), and click the *Edit* button next to this value.
3. Scroll down until you see the following:



Option to Enable Interest Lists

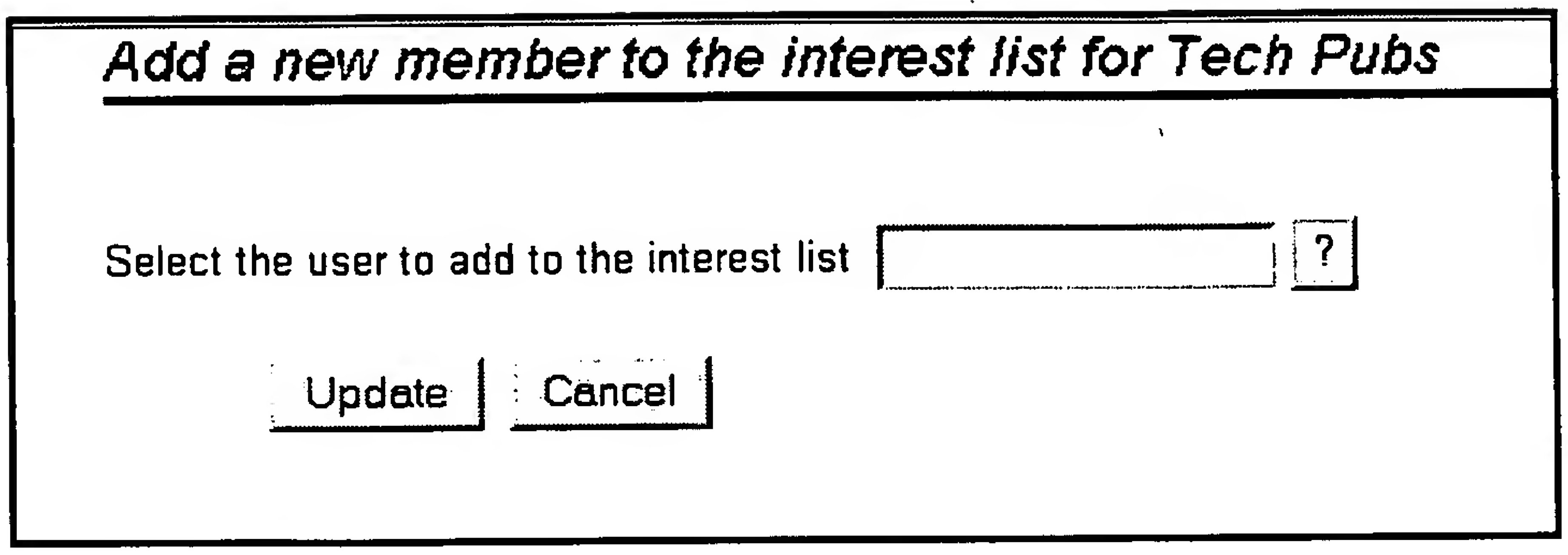
4. Check the **Yes** radio button.
5. Click the **Update** button at the bottom of the screen.
6. Click **Administration** and scroll down to near the bottom of the page.
7. Click on **Products**.
8. Locate the *Product* or *Products* to which you would like to add Interest List members, and click the associated **Edit** button.

The following screen will appear:



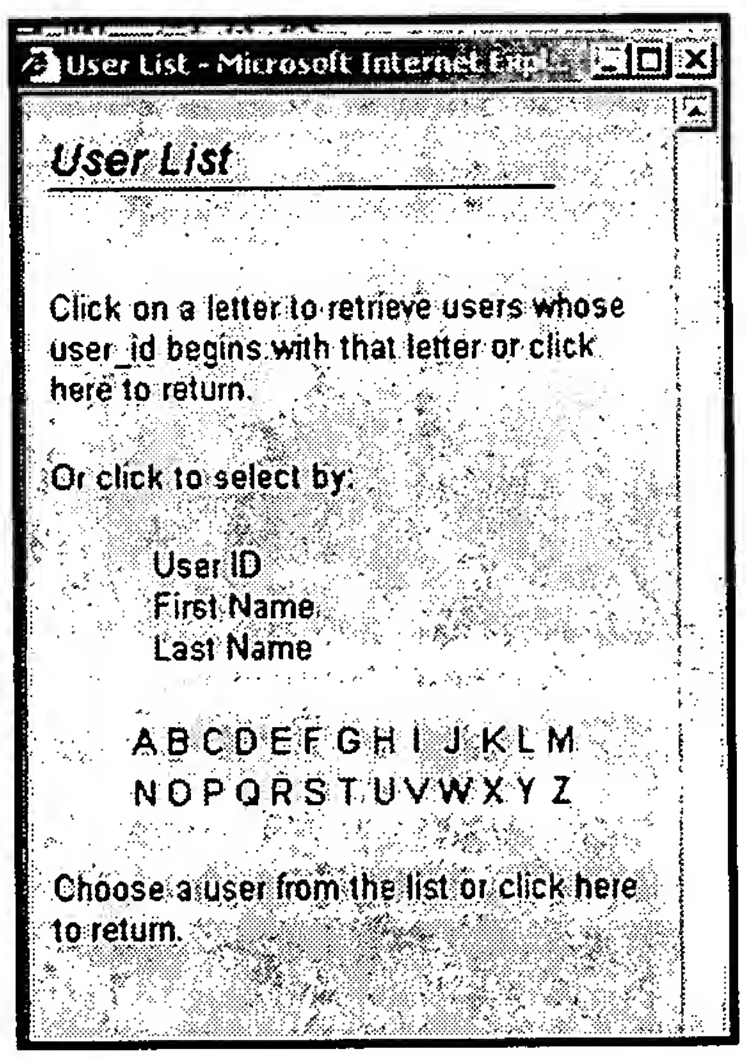
Change Product Details Page

9. Click the **Product Interest List** button.
10. Click the **Add a new member to the Interest List** button and the following screen will appear:



Add a New Member to Product Interest List screen

11. From the screen above, you can select the member of your organization you would like to add to the *Tech Pubs* (product for this example) interest list by selecting the question mark. A screen like the one below will appear, in which users can be chosen alphabetically, by user ID, First Name, or Last Name.



12. Continue to add users as desired by repeating step 11.

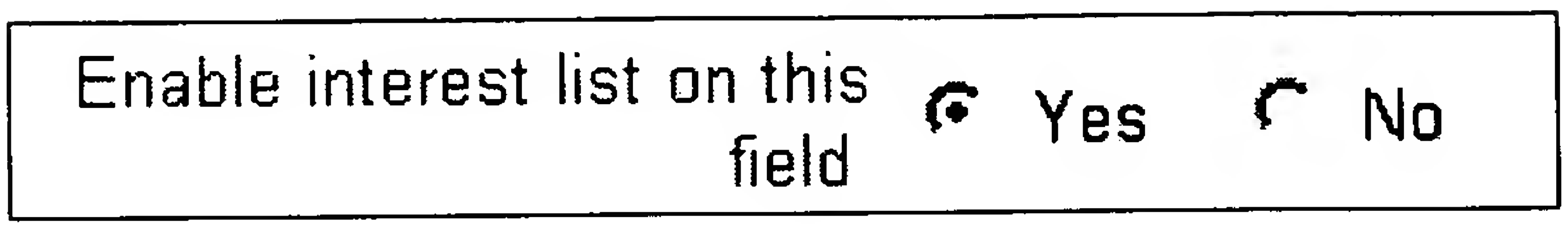
Create User-Defined Field Interest Lists

All Interest List members will be automatically sent email each time this product is involved with a problem issue. The same process can be used for *Products, Modules, Statuses, Priorities, Resolutions*, and *Severities.*

For this example, we will use the User-Defined Field *Platform*. To add members to UDF Interest Lists:

1. From Administration menu, click **Data Dictionary**.

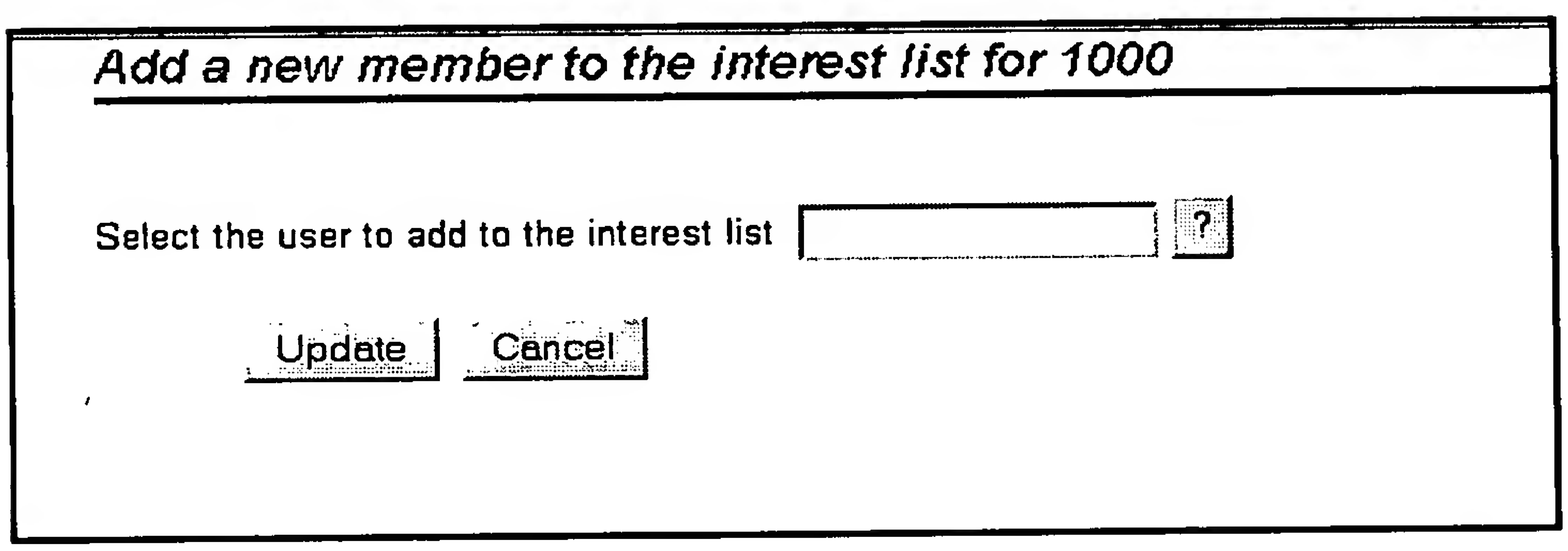
2. Scroll down until you see the *PLATFORM* UDF.
3. Click the associated *Edit* button.
4. Scroll down until you see the following:



Option to Enable Interest Lists

5. Check the **Yes** radio button.
6. Click the **Update** button at the bottom of the screen.
7. From the Administration menu, click on **User Defined Fields.**
8. Click the **List** button next to *Platform.*
9. Click the **Edit** button next to the particular *Platform* to which you want to add interest list members.
10. Click the **Add a new member to the Interest List** button.

The following screen will appear:



Add a new member to the UDF Interest List screen

11. Select the member of your organization whom you would like to add to the *1000 Platform* Interest List.
12. Continue to add users to the **1000 Interest List** as desired by repeating step 11.

The same process can be used for any other list **UDFs** in your system.

Edit Personal Email Interest Lists

A Personal Interest List can be maintained to allow someone other than the owner of a problem to track its progress. When a problem is placed on a Personal Interest List, the user will automatically receive an email each time a change is made to a problem in the database.

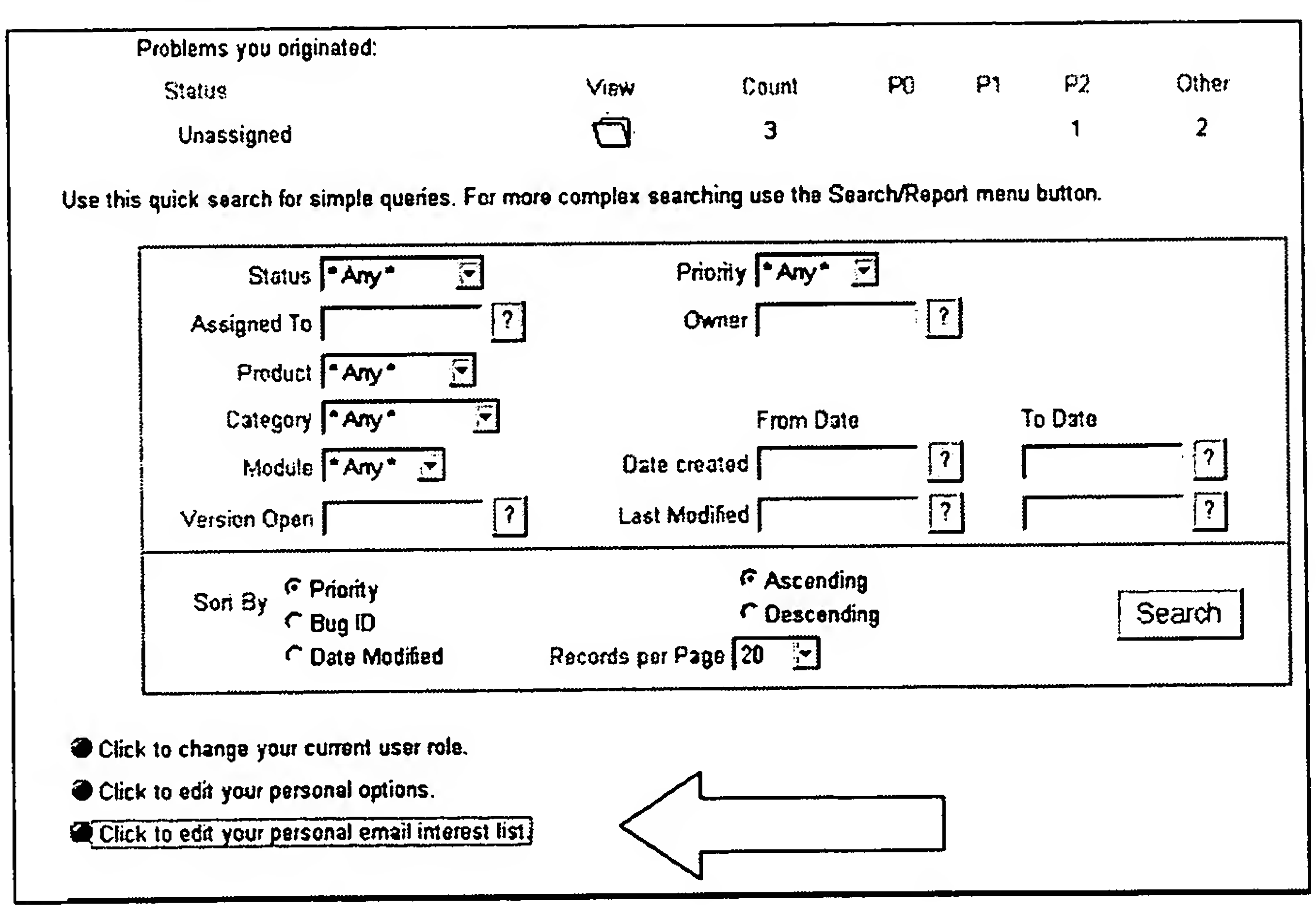
Emails are automatically generated to the owner of the *problem* and the assigned person of the new problem entered. If you are changing the state or other information related to a *problem*, then email is sent to the owner, the originator and the person assigned to the *issue*. If any of these values are the same, only one email will be generated per person. In addition, users can subscribe to an interest list for any problem.

1. Click the **Interest List** button at the bottom of any given Edit screen.
2. Click the **Add a new member to the interest list** button to add a person to the interest list.
3. Select the name of the user from the list that is presented.
4. Click the **Update** button.

   You can edit your inclusion on an interest list if you belong to one, but this does not apply to Product, Module or other specific field lists.

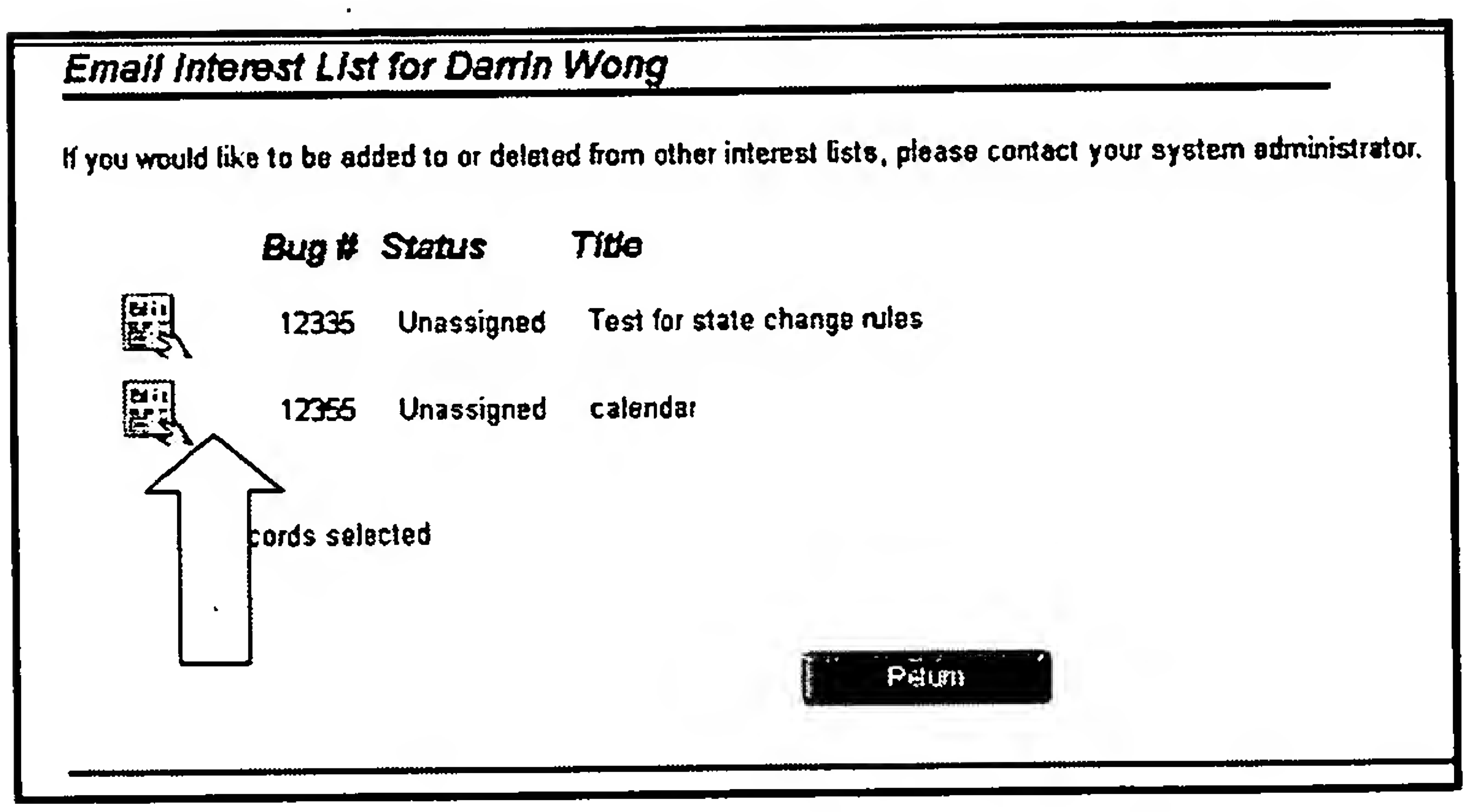
Remove User ID from Interest List

1. From your user Home Page, press the **Click to edit your personal email interest list** button.



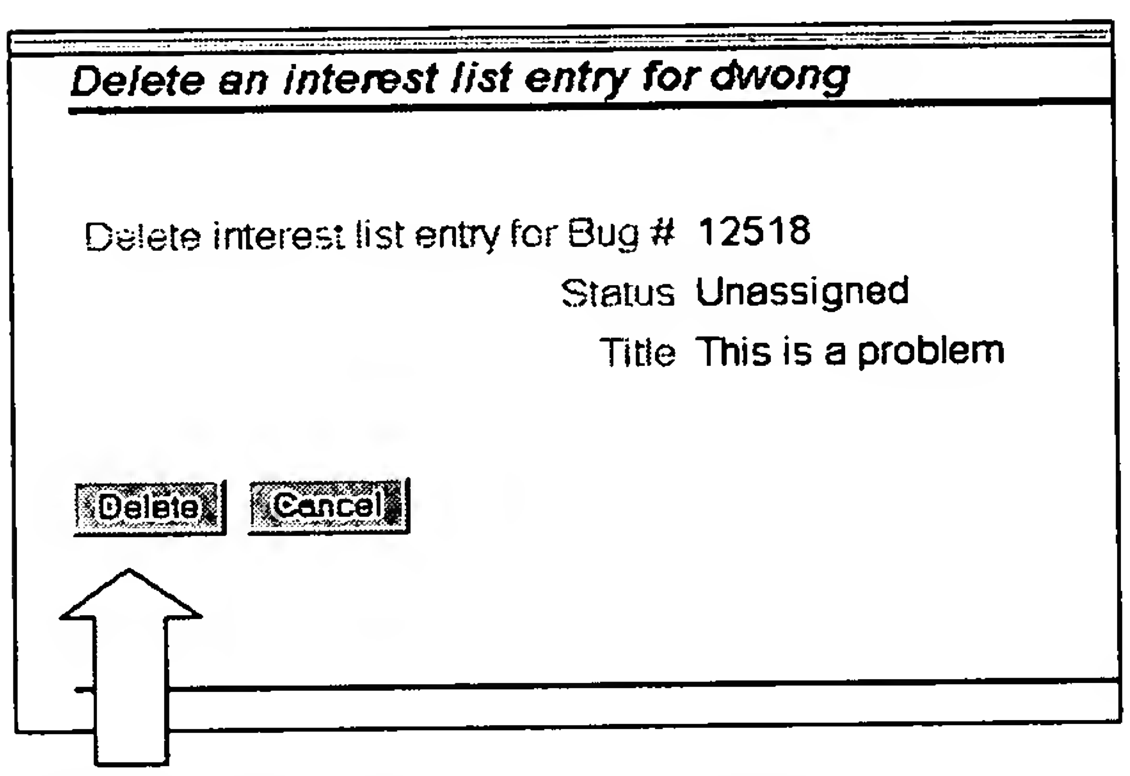
Home Page screen

2. Click the **Edit** icon beside the issue number from which you want to remove yourself.



Personal E-mail Interest List screen

2. Click the **Delete** button and you will be removed from the interest list.



Delete Interest List Entry screen

ExtraView Help

The ExtraView application includes a comprehensive HTML-based help system that you can access at any time by clicking the **Help** button on the navigator frame. In addition, many tool tips and context-sensitive links are defined throughout the application.

When you place the mouse cursor over a screen label that has a tool tip, a small window will appear next to your mouse cursor with a definition of what this label does. These labels allow you to define help tips for your users. If you press the mouse button over a label, you will be taken to a specific page within the help system. If you do not have a specific page defined within the screen name Administrative section, you will be taken to the Help Index page. This page consists of links to detailed information about the system.

ExtraView Help Index

This is the main Help Index for the ExtraView problem tracking and resolution system. From here you can navigate to any help topic. Help windows may be left open at all times that you are working on problem reports within ExtraView.

Help Topic List

- Before You Get Started
- Adding a New Problem
- Editing an Existing Problem
- Search/Report
  - Reporting & Searching Capabilities
  - Searching the Problem Database

- Security
  - Create and Maintain User Accounts
  - System Security Keys
  - User Groups
  - Grant Security Privileges to User Groups
  - Allowing User Groups to see only certain Statuses
- Reviewing Problem History
- Administration
  - Allowed Values
  - Batch Commands
  - Categories
  - Changing Personal Details
  - Data Dictionary
  - Default Values & Behavior Settings
  - Enclosure Types
  - Installation Setup
  - Module Names
  - Module Types
  - Priorities

ExtraView Help screen